

there
for you

supporting UNISON members
when life gets tough



A guide for branch welfare officers

Presentation guidance notes

Useful speaker's notes to help you raise the profile of There for You in your branch and alert members to the services on offer. This presentation can also be adapted to give a presentation to your employer.

This presentation has been designed for branch welfare officers and other welfare contacts to use at meetings of stewards, branch committees, annual general meetings and other events where activists will be present. We hope it will help you to raise your profile and that of There for You in your branch and alert more members to the services on offer.

CHECKLIST: tips when making a presentation

- Speak more slowly and clearly than in normal speech.
- Lots of pauses so the audience can absorb the different points you are making is a good idea.
- Try and add a bit of variety to your tone to keep the audience alert.
- Time yourself beforehand – we estimate that this presentation should take between 15-20 minutes.
- Plan for misjudging your time and have a few extra points available in case they are necessary.
- Presentations are better when they are adapted to the audience and style of the speaker, so do not be afraid to change the script. Similarly change the content to better reflect your actual experience as a welfare activist if necessary.
- Try and give it the personal touch by introducing some of your own examples.
- Always smile when you greet and leave your audience and introduce yourself and your subject – even if you think everyone knows who you are and why you are there.
- Do not block the audience's view of your screen.
- You will not be able to look at everyone, but remember to glance around the audience when you can. Following a "M" or "W" shape with your eyes allows you to cover the space and gives the impression that you are relating to everyone.
- Try and end on an upbeat note – include your own example of someone you have helped at the end if possible.
- **REMEMBER** – confidentiality. If you do share an example always ensure that the scenario described could not result in any listener being able to identify the individual who you helped.

Lastly, don't forget to:

- Order There for You publicity materials that your audience can take away to read/hold onto. You may also want to give everyone a There for You poster and ask that they each pin one up on their nearest staff noticeboard.
- Take the opportunity to tell your audience how and when they can contact you – either for more information, or for a chat if they're struggling.
- Think about adapting the presentation so that you can tell your employer about the help that's on offer and ways you can work together.



Introduction

Thank you for inviting me to speak at the Branch AGM/ Branch Committee/Stewards meeting.

My name is and I am your UNISON Branch Welfare Officer.

I am delighted to be here and to be given an opportunity to talk to you about UNISON There for You.

What I would like to do is:

- Say something briefly about There for You itself – who we are and what we do
- Give you a flavour of some of the issues affecting members.
- Describe some of our services
- And, finally, to make some suggestions as to how you can help us in our work and alert members to what's available.



Who we are

There for You is UNISON's own registered charity. We are unique in being one of the few charities linked directly to a trade union.

We began as the children's and orphans fund over 100 years ago and today we provide support exclusively for UNISON members and their families at times of personal difficulty and financial hardship.

At local level, help is delivered through a network of branch welfare officers. As a branch welfare officer I am supported by a team of caseworkers who are employed by the charity as well as other staff.



What we do

Together we support members in a variety of ways mainly through confidential advice and financial assistance in the form of grants.

Each year the charity gives out around £500,000 in grants and our main goal is to provide financial assistance as a short-term safety net.

Our focus is also on helping members to adjust to their circumstances.

Whether we can help with a grant is determined by various criteria. A grant could be made, for example, to help with household bills, ease debts.

We can often help with the extra costs of coping with a disability or caring for a family member with special needs.

These are just a few examples of circumstances where we can help.

Or, we can help with the cost of a much needed break – especially helpful for those who are desperate to get back to work. A break can make all the difference to their general wellbeing and recovery.

Added to this every day branch welfare officers and casework staff, handle numerous enquiries from members ranging from those needing advice to others who simply want someone to talk to.

In fact, the advice and information we provide on a wide range of issues is a vitally important part of our overall service offering.

We always ensure that members are claiming their full entitlement to state benefits and we can often to add to the effectiveness of our grant by collaborating with other charities.



UNISON DEBTLINE

£200 MILLION

UNISON members have been helped to manage over £200 million of debt since the service was launched

Call 0800 389 3302

there for you
supporting UNISON members when life gets tough

UNISON Debtline

As part of our commitment to improving and developing services that reflect the needs of members and their families, we also provide debt advice.

Many people struggle with debt at some point in their lives and UNISON members are no exception.

In fact debt is clearly a factor in around 85% of the cases that we deal with.

Sometimes all it takes is a small change in circumstances to tip the balance and turn a manageable situation into a debt problem.

Debt affects relationships, work performance and health.

The problem is growing and personal debt in the UK is now at its highest level ever.

The increase in demand for debt advice and has made it more difficult to access local services especially for those who work.

Members can call UNISON Debtline for immediate access to free and confidential advice. The service is provided by Payplan, a free national debt advice company with links to the voluntary sector.

For example, they can negotiate with creditors and reduce multiple debts to a single regular payment. They can advise on the most difficult of debt problems which may include bankruptcy. And if it does get that far then the cost involved in going down this route is something that There for You will often help with.

A special element of the service is that advisors are aware of the types of grant that we can make and will refer members to us if they think we can help. This is a special aspect of the service and especially helpful as members can contact UNISON Debtline direct.

By working with Payplan we can maximise the effectiveness of any financial assistance that we can offer.

What are the issues affecting our members?

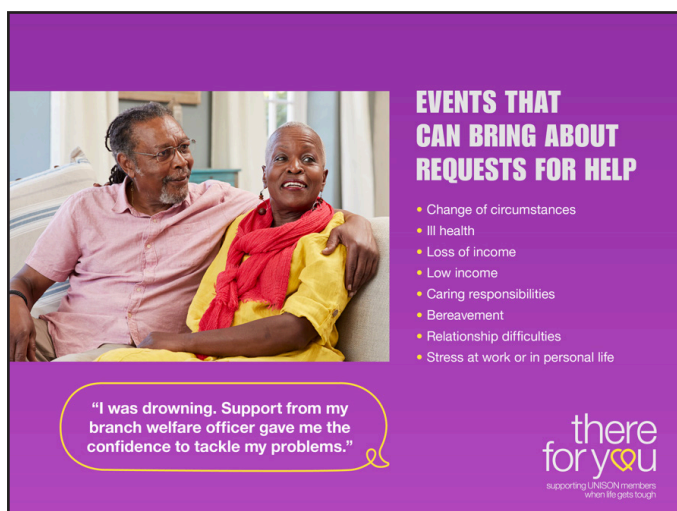
There is no easy way to describe a typical enquiry. All I can say is that in most cases, a member will approach us when they feel they have nowhere else to turn.

They are often desperate and many feel they have reached breaking point.

By and large we find that a change in circumstances for example:

- Ill-health
- Reduction in income or job loss
- Bereavement
- Relationship breakdown

... or a variety of circumstances which combined have led to their difficulties.



EVENTS THAT CAN BRING ABOUT REQUESTS FOR HELP

- Change of circumstances
- Ill health
- Loss of income
- Low income
- Caring responsibilities
- Bereavement
- Relationship difficulties
- Stress at work or in personal life

"I was drowning. Support from my branch welfare officer gave me the confidence to tackle my problems."

there for you
supporting UNISON members when life gets tough

Very rarely is it a case of someone mismanaging their money and sometimes it's simply because they are low paid and can't find the money needed when for example their cooker or washing machine breaks down.

And, often the trigger that leads them to contacting us is when something happens that puts them under intolerable pressure.

Maybe:

- They've ignored correspondence from the local authority, the courts or the credit card company and bailiffs are knocking on their door.
- One of the children is about to return to school and they can't afford the school uniform.
- It could be that they've lost a loved one and can't afford to pay the funeral bill.
- Their gas or electricity is at risk of being cut off or the house is freezing cold because they can't afford to keep the heating on.

- They're about to be evicted – for rent or mortgage arrears.
- Or, as with many in society, they need help to get away from an abusive relationship.

These are just some of the issues I may be dealing with. And some of the more complex cases entail working with staff at There for You, other agencies and the branch to find ways of stabilising the situation.

In this way we can secure appropriate support to help the member through this difficult period in their lives.

Every case is looked at holistically – in other words taking account of the whole situation – both from the position of the member and the impact on the rest of the family.



BRANCH WELFARE OFFICER ROLE

- To offer support and be there to listen
- To ensure members **get help** appropriate to their situation
- Assist with financial assistance applications
- Provide information about other organisations that can help

"My branch welfare officer made time to listen when no-one else would. That made me realise that I was not alone and someone was there for me."

there for you
supporting UNISON members when life gets tough

Branch welfare officer role

One of my main roles as a trained branch welfare officer is to assist members in completing the financial assistance application form.

This asks for quite a lot of financial information which, is necessary as a registered charity to ensure we make proper use of funds and also that we offer the most appropriate type of assistance.

There's no automatic entitlement to help (as a charity, we are required by our Constitution to show that there is unforeseen or unexpected hardship) however only in very rare instances do we find we are unable to offer any advice or help.

Sometimes just making time for a chat and exploring what help is available from elsewhere is all that's needed but can make a huge difference to how someone feels about their difficulties.

There are of course limitations to what I can do and my role does not entail counselling, providing expert advice or make decisions about who gets financial assistance.

What's important is that everyone in the branch knows that if I'm unavailable, or the problem presented by the member is outside my sphere of knowledge, then I will always refer to staff employed by the charity for their expert advice. Or, you can call the team yourself. There's always someone available during office hours to assist.

HOW YOU CAN HELP

- Distributing** publicity material amongst members
- Referring** members who you think we might be able to help
- Raising awareness** about the help available at constituency and other meetings with members
- Recruitment** ensuring potential members are aware of the full range of services
- Fundraising** encouraging members to join the UNISON Lottery



How you can help

These are some of the ways that we are supporting UNISON members and their families but we can only fulfil this role if they know they can apply at times of special need.

This is where you come in.

- I need your help to publicise our services to members.
- I need you to be my eyes and ears, to refer any members to me that you think we might be able to help (with their permission).
- There's a range of publicity materials: Posters, leaflets, postcards (the posters have space for my contact details). As well as information guides on our website which can provide you with more details on various subjects as well as the criteria that applies to different circumstances.
- BUT, all our research shows that the BEST form of publicity is word of mouth. Please do tell members about the marvellous support that is available at times of special need. If you are organising recruitment activities then make sure you have some of our materials available.
- When you next hold a constituency meeting, ask members if they can do their bit by giving them publicity material to distribute amongst their colleagues. It is these members who will most likely know if one of their co-workers is struggling.
- AND last but not least, if you can help with raising funds for the charity by promoting the lottery then that's a bonus! The fact is, if we want to see the service grow and, be in a position to help even more members, then we have to fundraise.

One member's story (if time)

To really illustrate how we can help, I'd like to just tell you about Melanie, a single parent who was already coping with bereavement and the aftermath of a divorce when she was forced to leave her new partner when he became violent. He had also been a drain on her finances. At the time of seeking help she was already £23k in debt. There for You helped with a grant of £500 for emergency food, clothing and travel to work. Further help was given when she was re-housed by the local authority which included providing beds for her and her two children, a new cooker, washing machine and fridge freezer.

Melanie was also referred to our debt service UNISON Debtline for advice on managing her debt as her change in circumstances meant that she simply didn't have the disposable income needed to meet her debt repayments. Although bankruptcy was an option, Melanie took the decision to make interim token payments while matters regarding divorce and financial settlement were under discussion.

Note to presenter: Here is your opportunity to give your presentation the personal touch by introducing one or two of your own case examples.

Always be mindful about confidentiality. If you do share an example always ensure that the scenario described could not result in any listener being able to identify the individual who you helped.

... And just in case you don't have an example, we've included information about 'Melanie' (not her real name) that you can use.

Conclusion

I hope this brief snapshot of UNISON's charity, my role as branch welfare officer and how we can help members has given you an insight into our work.

The scope of society's problems and their impact on UNISON members means responding to many different needs.

We do this in a variety of ways and mainly through confidential advice and financial assistance.

We are committed to developing our services as members' needs change and so that they remain relevant.

I've brought various literature with me so please do take some away with you if you are interested in finding out more.

There's an e:note training module which for me was a great introduction to the service. I would thoroughly recommend that all stewards and officers find the time to complete as part of our branch development programme so that we can all share in spreading the

word. It takes just 20 minutes to go through and in addition to what I've told you today, really will give you a good understanding of the service.

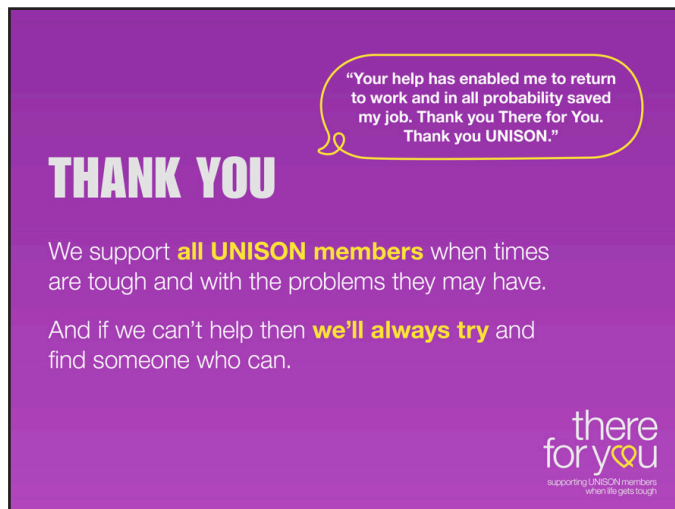
I've also completed a two-day induction course which will be followed by other seminars and training events which will keep me up to date with all the latest development.

You can always ring me if you want more information or need to discuss a specific problem that one of your members has.

Most importantly, if you know of anyone you think needs our help please do tell them about what's on offer.

All contact and applications are handled in complete confidence and with utmost sensitivity.

We are here to provide a safety net for members and their families.



THANK YOU

"Your help has enabled me to return to work and in all probability saved my job. Thank you There for You. Thank you UNISON."

We support **all UNISON members** when times are tough and with the problems they may have.

And if we can't help then **we'll always try** and find someone who can.

there for you
supporting UNISON members when life gets tough

Thank you

Thank you for listening. I'd be very happy to answer any questions you may have.

There for You – supporting UNISON members when life gets tough

Tel: 020 7121 5620

www.unison.org.uk/thereforyou



There for You is the working name of UNISON Welfare, a registered charity supported by UNISON the trade union. Registered charity no.1023552/SCO38305