

Branch Welfare Officer Guidelines



BRANCH WELFARE OFFICER GUIDELINES



We know that UNISON members face pressures which can severely affect their lives. There for You is the union's charity. It exists to provide support and give confidential advice and information to members and their dependents in times of need. In many cases offering financial assistance too.

There for You's ability to assist in this way is based on the work of branch welfare officers who give their time voluntarily, like all our lay officers, to help members in crisis. Without them the service would not exist.

I am sure that these Guidelines will prove to be an invaluable source of information and guidance to all branch welfare officers. I am proud of the service that There for You offers because I know our members and their dependents will be the ultimate beneficiaries.

Christina McAnea
General Secretary: UNISON



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SECTION 1:

ABOUT THESE

GUIDELINES

5 Introduction and mission statement

What are these guidelines?

Who should use these guidelines?

How to use these guidelines

Why have volunteer guidelines?

This section is an overview of the branch welfare officer guidelines and how to use them, who should use them, and what they are for. This chapter is intended to give you an idea of what will be contained in the rest of the manual.

Introduction and mission statement

There for You is the union's unique charity. We provide support, confidential advice and financial assistance to members and their immediate family at times of need when they may have nowhere else to turn. This assistance is often delivered through our network of branch welfare officers who give their time voluntarily to help their fellow members in crisis. Without them this great service would not exist.

Our mission is to:

- Be an invaluable resource for UNISON's membership when they are in need.
- Provide high quality advice, information and assistance to UNISON's membership when they are in need.
- Offer financial assistance to members and their dependants who are experiencing unforeseen hardship and who meet the criteria for support.
- Deliver services that are flexible, relevant, responsive and, can be accessed both locally and nationally.

We will look in detail at the different kinds of help that There for You provides in [Section 7](#)

What are these guidelines?

These guidelines were written as a result of There for You's commitment to provide training for its volunteers and the content is based on what branch welfare officers said they'd like to see included. They enable anyone interested or involved with the charity to understand the work we do and the standards of practice we follow. They are intended to allow branch welfare officers to train and develop themselves, and to provide a resource that will grow with each officer. They are also intended to be a source of reference for any UNISON member interested in our work and a permanent resource for each branch.

We hope they will ensure the best practice from our network of volunteers and ensure the best possible service for UNISON's membership.

Who should use these guidelines?

They have been written primarily as a guide and a resource for branch welfare officers and any members of UNISON who are considering volunteering as a

branch welfare officer. In addition, they are also meant to be a useful resource for anyone involved with the charity who wants to know more about the work carried out at local volunteer level. This might include branch secretaries, reps, regional staff, members of regional welfare committees or simply any member who is interested in our work.

How to use these guidelines

These guidelines are organised into 11 sections, and each section into short sub-sections so that it is easy to quickly find the information that you require. Don't feel that you have to read them from cover to cover. A good place to start if you are a new branch welfare officer is [Section 4](#) on the role of the branch welfare officer. There is a "getting started" checklist at [Section 5](#) and a diagram of the typical stages of assistance you might provide in [Section 7](#).

There are many other checklists throughout these guidelines which are intended to help you remember and act upon all the advice and information you are receiving and for learning about your new role.

Why have guidelines?

Guidelines will help to establish high standards within There for You, they will make volunteering easier and they will improve the experiences of those members who come to us for help with life issues that will often adversely impact on their health, finances, family stability and how effective they are at work.

It is crucial that There for You complies with current legislation on charities and adheres to the standards of good practice for charitable organisations. It is also crucial to adhere to proper health and safety standards. We want to ensure that all our volunteers can carry out their activities in a safe and legal manner and that volunteers are not put at risk.

There for You values all those members who volunteer their time to help their fellow members. We want them to feel that they are being supported with training and materials that helps them work effectively. This will also ensure that there is a consistent high quality of assistance being offered to UNISON members across the 12 regions. These guidelines will ensure that all volunteers have a full description of the role of the branch welfare officer. Given some branch welfare officers can find it difficult to attend training days they will now have access to a relevant information resource that they can use in their own time.

SECTION 2:

BACKGROUND

TO THERE FOR YOU

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 - New millennium onwards
 - Our legal structure
- 8 How is the charity funded?
 - Accountability

In this section we will take a brief look at the history of There for You and our plans to meet the challenges of the future. We will look at our charity status and what it means in terms of the law, fundraising and accountability.

This section is intended to help you understand our organisation and the different rules under which we operate.

Our proud story

The charity was founded by NALGO as the National Benevolent and Orphans Fund over 100 years ago back in 1910. The charity's income was £54 in its first year.

The primary purpose then was to help members, widows and orphans in financial difficulty. In an era before the NHS, the fund also supported members at times of sickness and poor health.

The close of the Second World War saw the founding of the NHS and the Fund acquired its first convalescent home, the first of four, beginning a long tradition of providing seaside convalescence for members who had been ill. The Fund changed its name to the NALGO Welfare Fund in 1971.

The registered charity UNISON Welfare was established in 1993 after the amalgamation of the three partner unions which formed UNISON – NALGO, NUPE and COHSE.

A review 'Towards 2000' turned the spotlight on UNISON Welfare's charitable status and helped to guide the organisation over the next few years and saw the introduction of new services. In 2010 we celebrated our centenary.

More recently, we changed our operating name and now promote ourselves under the working title There for You however our registered charity name remains UNISON Welfare.

New millennium onwards

The new millennium heralded a new approach to our services in response to the changing needs of the membership.

Much of the impetus for the changes came from a survey of our members which paved the way for all our subsequent work to develop a truly modern service, responsive to need.

Our legal structure

What is a charity?

A charity is an organisation set up to help society in some way – whether that's helping certain groups (as in UNISON members) or elsewhere in the world, promoting arts or sport, or helping the environment etc. Charities can't make profits – all the money they raise has to go back towards achieving their aims.

Who regulates charities?

The Charity Commission for England and Wales is the non-ministerial government department that regulates registered charities in England and Wales and maintains the Central Register of Charities. The Charity Commission answers directly to the UK Parliament rather than to Government ministers. In Scotland, the Office of the Scottish Charity Regulator performs a similar function.

What is a Constitution?

This is our governing document which has been approved by the Charity Commission. It works as a rule-book setting out our charitable purposes (objects) and what our charity can do to carry out its purpose ('powers').

Our Constitution & Rules stipulates that our activities must focus on helping members who are facing unforeseen hardship. These include:

- Illness
- Injury
- Relationship breakdown
- Bereavement
- Loss of income

Currently, our activities centre on supporting members in four key areas:

- Financial assistance
- Health & Wellbeing
- Debt advice
- Signposting, support and information

We will look at each of these areas in turn in [Section 7](#).

Our governing body

Charity law requires a body of people called 'trustees' to run the charity and this group has ultimate responsibility for the management and administration, and for the effective use of any money it receives.

We look further at the role of the trustees in [Section 3](#).

How is the charity funded?

Like all charities, we receive our income from donations and investments. Around two-thirds of our donated income comes from UNISON itself. We have to make an annual report to the Charity Commission, including accounts for the year which must be audited. We are committed to keeping clear accounts for all of our fundraising activities and expenditure.

Nearly half of all our expenditure goes on grants to individual members. The remainder is spent maintaining our network of volunteers, staff, fundraising and publicity costs. It is very important that all money paid out is for purposes that achieve our charitable objectives and not anything else.

Fundraising is an important activity as it helps us to expand our standard services and develop new services to meet the membership's needs.

Accountability

Our board of trustees are accountable to a variety of organisations and people. They are accountable to the Charity Commission, to our donors (primarily UNISON) and staff and volunteers.

Branch welfare officers are accountable both to their branch committee of which they are a member and to the charity itself.

UNISON is our main donor. All our volunteers are UNISON members and so will be fully committed to the union's aims and ideals. However, it is important that There for You itself does not become involved in political activity. Whilst the charity is part of the family that is UNISON it is still a separate legal entity that operates under a Constitution and Rules that has been approved by the Charity Commission.

Annual General Meeting

Our Constitution also requires that we hold an AGM and this provides us with the opportunity to reflect on our successes and, look to the year ahead. This event is always held during National Delegate Conference week.

The Constitution lays down who is eligible to attend the AGM (delegates) and includes branch welfare officers. An invite to register is sent out via email well in advance of the event itself.

SECTION 3:

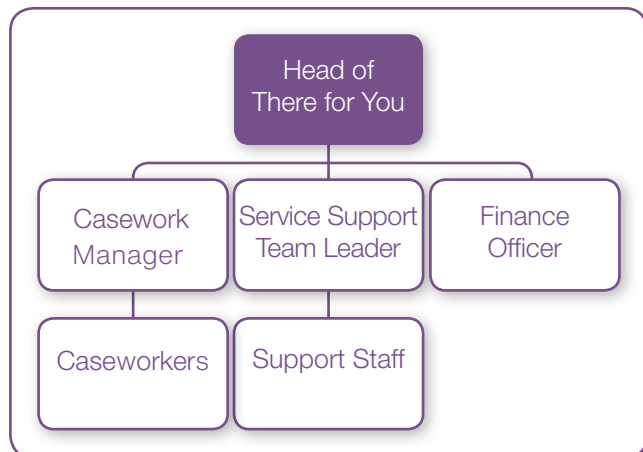
THE STRUCTURE

OF THERE FOR YOU

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In this section we will look at who does what within the charity. To find out more about the wider organisation that is UNISON, please go to www.unison.org.uk

Support is offered through our team of experienced staff at UNISON's national centre in London. They are all there to listen and to help.



National welfare office

This London-based office is run by paid officers and managed by the Head of There for You. They provide support to regions and to branches they develop strategy, services, policy and training; they also advise and guide the trustees as to their legal responsibilities. The office is made up of a number of different staff.

Head of There for You

The Head of There for You is the strategic head and manages the national office and all the staff. The Head of There for You is the link person between senior lay officers, the trustees and other UNISON officers. The Head of There for You has final responsibility for the decisions made by the national office and is directly accountable to the board of trustees. The board of trustees has overall responsibility for the management of any services provided both by There for You nationally and locally (region and branch). Also, the suitability of any services delivered through third party organisations such as UNISON Debtline.

Casework team

Caseworkers and the Casework Manager deal full-time with all the applications for financial assistance and giving advice when appropriate to members. This team also offer advice and support to branch welfare officers and regional welfare committees when requested. This team are always there to help branch welfare officers and are an expert and valuable resource for you.

Support team

The support team who, as well as dealing with day to day administration, help co-ordinate the branch welfare officer training programme and other meetings and events. Critically, this team are the first point of contact for both our branch welfare officers and members who may be looking for some initial support and guidance.

Finance

Our finance officer is responsible for managing the charity's finances. Overseeing the performance of investments and providing management information to the charity's board of trustees.

Regional welfare leads

In each region, an officer is assigned responsibility for supporting the work of the regional welfare committee which includes keeping in touch with their branch welfare officers on more local issues including training and development. The work they do on behalf of There for You is a small part of a much bigger role that they carry out on behalf of UNISON. For the name of your regional lead email: thereforyou@unison.co.uk

“If it hadn't been for your calmness and patience over the phone I would not have faced my deepening financial problems. Thank you for looking after members”

Volunteer structure

There for You relies on its network of volunteers to function, and so we would like to encourage as many members as possible to become involved with our work. The level of involvement will vary between members depending on how much time they can spare, how interested they are and their level of expertise in the kind of work we do. Some members may begin by helping out in our fundraising initiatives, whilst others may volunteer for more substantial roles.

Board of trustees

As a registered charity, we have our own rules and constitution. As such we have to conform to charity law. The law states that a body of people called 'trustees' must run a charity. They take responsibility for all the work done by the organisation, they make decisions in the charity's best interests and they ensure it is run cost-effectively and efficiently. The board of trustees is made up of six UNISON national executive council (NEC) members, and six members elected from amongst the branch welfare officers and regional welfare committee members. Trustees are elected biennially with new NEC members being appointed one year and elections for members occurring the next year. Each trustee is allocated a specific region to link directly with as a resource and a support.

Regional welfare committees and forums

These are the bodies in the region which are actively involved with There for You. This group will provide your main local support and is often made up of very experienced branch welfare officers. They are the main communication channel between the board of trustees and branch welfare officers and are involved in a wide range of activities promoting what we do. They assist and encourage the recruitment of new branch welfare officers, promote and co-ordinate fundraising activities, they raise awareness of issues regionally, organise training activities and forums for branch welfare officers to network, they monitor and evaluate the work that is going on in the region and discuss their concerns with the national office and the trustees which in turn helps shape the strategic plan. They also report to the charity's AGM.

Varying in size, their composition is written into each region's rules and constitution.

Branch welfare officers

The UNISON Code of Good Branch Practice recommends that every branch elect a branch welfare officer each year. Essentially branch welfare officers are the first point of contact and "human face" for There for You. As a branch welfare officer you will provide and signpost members to information, advice and services at a local level, help with applications for financial assistance and, ensure members are aware of the services that are on offer.



Branch welfare officers can come from any area of UNISON's membership. Some volunteer because they have had experience of personal problems like illness, bereavement or debt, and feel they have an understanding of the problems that members can face. Some may receive help in their role by other officers or reps who become a 'welfare contact' for a specific section of the branch e.g. retired member who wishes to contribute to the well being of their fellow retired members and assist their branch welfare officer. Other volunteers simply have an interest in helping people in crisis.

Whatever the reasons for volunteering, being able to empathise with members' difficulties, to listen well and to give non-judgemental support is the key to being a successful branch welfare officer.

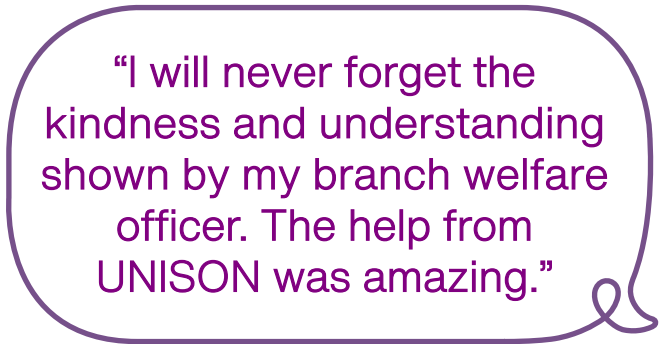
We look at the role in greater depth in [Section 4](#).

Recruiting and retaining branch welfare officers

There for You would like every branch to have a welfare officer. If your branch doesn't have a welfare officer it is a good idea to start looking for someone suitable for the role. Officers can come from any area of the union's membership as laid down in the UNISON rulebook.

In a survey of branch welfare officers we asked what made them want to become a welfare officer. The overwhelming response was that welfare officers simply like helping people. We also asked which were the most important skills a welfare officer needs to develop for the role. The main attributes identified were:

- ✓ Listening skills
- ✓ Being non-judgemental
- ✓ Confidentiality
- ✓ Empathy
- ✓ Willingness to develop an understanding on statutory welfare benefits.



"I will never forget the kindness and understanding shown by my branch welfare officer. The help from UNISON was amazing."

We offer a comprehensive training programme to help branch welfare officers develop these skills and keep up to date. Our hope is that branches will support any training requests and so that their welfare officers know they are needed and valued.

Sometimes one branch welfare officer will step down and no-one else will be prepared to take on the role. It is important to plan the succession of welfare officers in a branch, rather than waiting until one retires before finding a replacement.

SECTION 4:

THE ROLE OF THE BRANCH WELFARE OFFICER

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 - How we work
 - What makes a good branch welfare officer?
- 15 What skills do branch welfare officers need to develop?
- 17 What is the welfare officer's place within the branch?
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The role of the branch welfare officer

In this section we look in detail at the role of a branch welfare officer. We will look at the qualities and skills the role requires and the rights and responsibilities it brings within the branch. We will also look at what you should be doing to get started in the role. This section is essential reading for all new welfare officers as it is intended to let you know what your role is like and give you the confidence to begin work. There is a checklist at the end of this section to help you get started.

How we work

We pride ourselves on trying to do the following when we work with members:

- Being supportive and non judgemental, aware of our prejudices but removing them from the process as far as possible.
- Dealing with every member/case individually.
- Encouraging members to act for themselves rather than trying to do everything for them.
- Giving bad news as part of the job on occasion, trying not to give false hopes but always trying to offer additional or alternative forms of help.
- Managing expectations – it's not possible to always agree
- Understanding the significance of endorsing an application form for financial assistance as factual and identifying any unforeseen, unexpected or exceptional circumstances.

What makes a good branch welfare officer?

There are many aspects to being an effective branch welfare officer. Let's consider some of the more important attributes.

A desire to help members

This is the first and perhaps most important part of being a welfare officer. If you want to make a difference to the lives of members in need, being a branch welfare officer can be an immensely rewarding role. Many welfare officers volunteer having experienced their own difficulties and wanting to assist others in a similar situation. It is important however to want to help all members who contact you, even if their situation is not one that you are familiar with.

Being an ambassador

For many members, the branch welfare officer will be their first and only contact with the organisation. It is important to bear in mind then that for them, their opinion of There for You will be based to a large extent on the impression you create. You should always try

to behave in a way that reflects well on There for You, the union and the great work it does.

We will look in detail at the standards of good practice that we expect in [Section 6](#).

Being clear about your role and about the services that are available

A key part of being an effective welfare officer is an understanding what your function is within the organisation. You do not need to be an expert in every type of problem that members can face. You do need a genuine interest in getting information so that you know what we can offer and which other agencies may be of help. You will often not be providing assistance directly, but you will be the point of access to the services provided by us and other organisations. This role is sometimes known as being a "gatekeeper".

An ability to work efficiently

Being a caring person does not mean that you do not have to be well organised too. Having an efficient system for keeping and tracking your records is essential, first for effective handling of your different cases, but also should anyone else ever need to attend to your work in the case of your absence or if you decide to move on.

Ensure that correspondence is coming direct to you as the named welfare officer and, that everyone who needs to know that you are now in post is aware of it – especially your branch reps.

Getting back to people quickly is important when you are a welfare officer, so it is helpful if you regularly check your email or voicemail. Help can often be required at short notice due to some emergency or unexpected event, so your quick response can help to reduce the stress for those concerned.

If you are going away and no-one else in the branch can deal with welfare enquires then always ensure your branch colleagues including reps know to contact There for You staff in London rather than delay getting help to your members.

Keep up to date

A good welfare officer will always keep up to date with latest developments within There for You. This may mean regularly checking on the website for latest news and information, ensuring all materials and forms that are held in the branch are current versions, carefully reading all communications sent by There for You and, briefing your branch and reps accordingly.

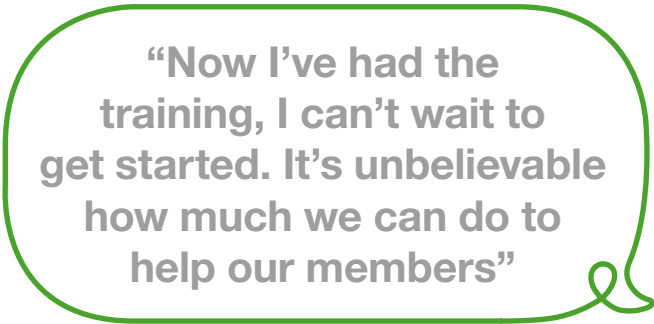
An understanding of equal opportunities issues

We are fully committed to providing an equal opportunities service which reflects the diversity and recognises the social issues faced by many of our members.

We will look in more detail at this issue in [Section 6](#).

Asking questions and seeking support and advice when unsure about something

It is always better to check anything you are unsure about before acting. The staff team in London is always there to answer any queries you may have and to lend support in difficult cases. Other welfare officers are also a valuable resource for advice, information and good ideas. It is also important to recognise the stresses that can sometimes build up in you, and to allow yourself to seek support from colleagues in There for You.



“Now I’ve had the training, I can’t wait to get started. It’s unbelievable how much we can do to help our members”

Undertaking training

Learning and improving your skills are vital to becoming a good welfare officer and providing a good service to our members. Although it can sometimes be difficult to fit training days into your schedule, you should do your utmost to make it to as many as possible. Whenever There for You sends you information it is something important. Make sure that you give priority to these internal documents and that all items to do with welfare issues are coming directly to you.

We look in more detail at training in [Section 5](#).

What skills do branch welfare officers need to develop?

The main skills you will need as a branch welfare officer are:

Listening skills

Being a good listener is a skill that all branch welfare officers need to cultivate. Really listening to the details of what someone is saying, rather than merely getting the gist of what is being said, requires switching to a different frame of mind from everyday chatting. When someone is speaking at length it can be easy to switch off, to nod mechanically or to repeat a few stock phrases.

Sometimes we can miss what is being said because we are already thinking about what we’ll say in reply. Developing the ability to concentrate on what people are actually saying may take some time and effort, but it is an invaluable skill that will help you communicate better both as a welfare officer and in general.

We will look at this in [Section 8](#) when going through the interview process.

Being non-judgemental

Sometimes you may feel that a member has acted badly or unwisely, sometimes you may feel cynical about some of a member’s claims. In such cases you should be careful not to allow your personal feelings to influence how you respond to the member’s situation. Our experience is that only a tiny minority of members ever try to take advantage of the system; it is far more common for members to be unwilling to seek assistance that they may be eligible for.

It is very important, both at the initial enquiry stage and during any subsequent discussions, to concentrate on getting the facts of the case clear rather than trying to judge cases for yourself. There for You has devised robust procedures for checking whether requests for financial assistance meet our criteria, and the team of caseworkers in London are able to judge cases from a more objective distance.

Empathy

Even when a member may have acted in a way that you don’t approve of, you must try to empathise with their position. This means putting yourself in their shoes and feeling what they feel in the situation, even if it’s a situation that is alien to you or that you disapprove of. Instead of dealing with a problem straight away, people often let it grow into a real crisis because they are worried by what other people will then say about them; i.e. by people judging them. It is vital to discourage a member who has worked up the courage to seek help with their problems by sounding judgmental or disapproving.

We will look at verbal and non-verbal communication skills in [Section 8](#).

Confidentiality

Confidentiality essentially means not disclosing any personal information about a member, about them contacting us, or about their difficulties. As a welfare officer it is very important that you respect the highest standards of confidentiality when dealing with a member’s problems. It is vital to There for You that members know that they can contact us in confidence. Failing to maintain the highest standards of confidentiality will have a negative impact, not only on your reputation

as someone to turn to in times of crisis, but also on our reputation as an organisation.

We will look at There for You's policy on confidentiality in more detail and what it means in [Section 6](#).

Counselling approach

Whilst branch welfare officers are not expected to be counsellors, 'counselling' is a term for the techniques used in helping people to learn about themselves. It involves helping them to develop the skills and self-awareness to cope with the problems and situations that they may encounter in their lives. By listening well in a non-judgemental way, by helping the member reflect on and summarise their situation and by helping them to set their agendas and make effective plans of action, you will empower members to help themselves.

We will look in more detail at some of these techniques in [Section 8](#).

Awareness of statutory benefits and other sources of help

Although you will not be expected to become an expert on all available benefits (whether from the Department of Work and Pensions [DWP], other grant giving charities, local authority or your local support services and organisations etc.), the more knowledge you can gain on the types of benefits and range of support that exists, the better you will be able to advise members. Remember though, if you are at all unsure, either signpost the member to the team in London or speak to the team yourself. It's often better to give no advice than incorrect advice.

Form filling (financial assistance)


We strive to make our application forms as straightforward as possible, but the information needed is necessarily complex and quite detailed. If we don't get all the relevant information we need at this first stage in the application for financial assistance process, we will require much more of both the member's time and our time trying to get the information later. Helping to ensure that the application form is full and correctly filled out is therefore a very important part of your role. This means verifying that the information is correct, that all the questions have been answered and that all relevant paperwork, e.g. copies of bills, bank balances, etc. have been included.

We will look at the application form in detail in [Section 9](#).

Understand your boundaries

Objectivity and detachment are valuable to any branch welfare officer. Being able to set boundaries so that you can maintain proper relationships – friendly yet professional with a degree of distance – will help both you and the member in the longer run.

We will look at this in more detail in [Section 6](#).



"My branch welfare officer was so supportive. Having someone listen to my problem truly helped"

What is the welfare officer's place within the branch?

The welfare officer is elected annually with all other branch officers and is a member of the branch committee. You are a key part of the branch and its effective functioning.

- **You hold** an important role and need to attend branch meetings and be an advocate for the service. This will ensure that welfare issues are properly discussed when considering the branch's plans and strategies.
- **You are** the link between the branch and the region.
- **You should** also try to participate in branch and regional training courses and seminars so that you are involved in the branch and up to date with UNISON's policies.
- **You are** the person who knows and gives information about There for You activities such as fundraising events that need your branch's support.
- **You are** accountable to the committee and should make regular reports about your work. The branch needs to be aware of the issues affecting their members that could be relevant to establishing bargaining priorities with employers. Be careful not to involve any confidential information, which could reveal members' names or their situations.
- **UNISON is the main donor** to There for You and it is perfectly normal for branch welfare officers to be fully committed to the union's aims and ideals. However, it is important that There for You itself does not become involved in political activity of any kind e.g. UNISON's political campaigning, as this is not permitted by charity law (or, only where it is appropriate and endorsed by the charity's board of trustees).
- **You should be supported** by your branch to receive training and attend courses, and the role of the branch welfare officer should be seen as beneficial to the employer in helping its employees.

We will look at confidentiality in more detail in **Section 6**.

“Probably the best way to recruit new members and new activists is to set an example. People are inspired when they see a highly motivated volunteer.”

Before turning to the checklists at the end of this section, take a moment to be inspired by Wendy's thoughts on what it means and what it takes to be an effective branch welfare officer.

BE INSPIRED

Working together – Supporting members

Branch welfare officer, Wendy, describes her branch welfare officer role

"I've been a volunteer branch welfare officer for 14 years now and, like many others, became involved after receiving help from the union with a work problem – initially I wanted to put something back into the branch out of gratitude however since then my role has expanded.

As well as joint branch welfare officer, I am also branch chair. I know I'm not the only welfare activist who wears more than one hat and many other union activists will be in a similar position.

Much of my work as branch welfare officer involves publicising the service and doing what I can to get my face known. I'm often seen at induction days, staff events or doing my bit to raise funds.

A few years ago, I was asked to be part of a task group that There for You had established where my experience and front-facing role provided helpful insight into some of the challenges we deal with.

For me the most important part of being a branch welfare officer is the day-to-day contact with members. Supporting members involves elements

of signposting and knowing when and when not to make an application for financial assistance. Most of all, you need good listening skills!

I learnt early on that there was only ever going to be so much I could do as a volunteer and getting support is important. This can be from branch colleagues or talking things over with a caseworker at national office.

Much union casework has an element of welfare within it. Whilst many problems can be tackled collectively There for You complements this work by providing additional support to members. What's more, as branch welfare officers we have a unique role to play.

Most union volunteers are committed individuals who are carrying out the work through goodwill towards fellow employees however, as volunteers ourselves we often develop new skills and gain confidence from helping others.

Probably the best way to recruit new members and new activists is to set an example. People are inspired when they see a highly motivated volunteer."

CHECKLIST 1

What does it mean to be a branch welfare officer?



- ☐ **You are** a link between the member and both There for You head office and your regional welfare committee.
- ☐ **You are** an ambassador for There for You and an advocate for the service.
- ☐ **You are** the designated person in the branch to help your branch members to get the advice and assistance.
- ☐ **You are** the sign poster for members to ensure they get appropriate help. You may suggest they contact national office, a regional welfare officer or a local agency in your area.
- ☐ **You are** a local supplier of application forms. If a member needs help in filling in the form you can either help them yourself or suggest they contact the national office staff in London.
- ☐ **You are** an information giver about the services There for You offer to members or their family.
- ☐ **You are** a recruiter for the membership. The more you tell people about us the more our services will be used and UNISON's membership will grow in strength.
- ☐ **Agood** branch welfare officer knows their boundaries and limits, understands and respects the need for confidentiality and willingly asks both national office and other organisations for assistance.
- ☐ **Youhold** a unique role in UNISON as you are both an officer for the union and a volunteer for the charity. This is a dual role and it is essential both structures' needs and regulations are met.

CHECKLIST 2

What does it not mean to be a branch welfare officer?



- ☐ **You are not** a counsellor and able to deal with situations that require psychological support.
- ☐ **You are not** an expert in benefits who can give full advice.
- ☐ **You are not** a medical expert who can offer medical advice.
- ☐ **You are not** expected to know about how to manage situations you are not trained professionally to deal with.
- ☐ **You are not** a home visitor – There for You does not offer this service.
- ☐ **You are not** the decision maker about who gets financial assistance so you must not make any promises.
- ☐ **You are not** an advisor offering definitive information. All advice must come from the casework team or other professional bodies.
- ☐ **You are not** expected to be available 24/7. There for You is not an emergency service and there will always be situations that are more appropriately dealt with by organisations that are set up to deal with crises.

CHECKLIST 3

Your role in the branch



- ☐ **You are** an elected committee officer elected annually alongside all the other elected officers.
- ☐ **You hold** an important role and need to attend committee meetings and be an advocate for the charity and report back on your work to the branch.
- ☐ **You are** the link between the branch and the region and need to maintain this through attending training and any event held in the region.
- ☐ **You are** the person who holds the information needed for members in times of personal difficulty.
- ☐ **You are** the person who knows and gives information about There for You activities such as fundraising events that need your branch's support.
- ☐ **You are** the person responsible for ensuring There for You services are properly promoted so that members are fully aware of the help that is available.

SECTION 5:

GETTING

STARTED

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A place to work

There are a few practicalities you must deal with in the early days of getting started in your new role. Setting yourself up with a good working environment will give you confidence and allow you to give the best possible help to fellow members.

Make sure you have an appropriate place to work. The ideal requirements for the work are:

- Some office space where you can meet with members or have a private telephone call. This may be in the branch office, at your place of work or, at the regional office.
- Many members will not find it easy to get to see you so a lot of your communication with them will be on the telephone or by email. You will still need a quiet private space to deal with these conversations.
- It is essential not to meet members at their homes or in a place that is not public – you may only be able to have a meeting space for a few hours a week, so plan your appointments for that time.
- Create a good, quiet, supportive environment that is comfortable for you and them to talk.
- Have access to a computer, paper, telephone, some space to keep resources and a locked cupboard for any notes and application forms.
- Make sure your emails are kept in a confidential file and replied to when no-one else can read them. Make sure you check with the member whether they prefer to use a home or work email address.
- You may have to keep some things at home if there is nowhere in the branch office or your job isn't office-based.
- Always ensure that any documents kept at home are still stored securely.

Handover

Ideally the previous welfare officer will be able to hand over to you all existing materials and any on-going cases. Also, that they will go through their filing system and list of contacts, external support organisations that they have established. It is your responsibility to ensure that this changeover takes place efficiently and that

you know where all old files are located. So have a meeting (and take notes) and/or get them to write a handover document.

Talk about the following:

- Problems they faced in the role and how they tackled them.
- Where any existing 'There for You' materials are (make sure not to stockpile).
- Management who you will need to work with and information on any relevant agreements such as facility time that exist.
- Any previous 'welfare' events that they've organised and what worked well.
- Find out if your branch has a small local fund that can be used to purchase items such as flowers or greetings cards at a time of sickness.

Training

On appointment, you should as soon as possible aim to complete:

- The online Branch Welfare Officer e:note since this is the best starting point to begin to appreciate what your role entails and the help you can offer members.
- You must also complete the online Data Protection (GDPR) e:note as this will ensure you fully understand your responsibilities as far as the General Data Protection Regulations (GDPR) are concerned.

Each will take no more than 20 minutes to complete.

Go to e-learning.unison.org.uk

Of course, reading through and regularly referring to these guidelines will also give you much of the essential information you need on a day-to-day basis.

However, to become an accredited welfare officer you must complete the training. This training is delivered by There for You staff who have a wealth of experience and knowledge and who will be dealing with any financial assistance request[s] submitted by you.

“The course was very helpful and lots of knowledge gained. The tutor was calm and very informative. I have learned so much. Thank you.”

To find details of training that is being organised for branch welfare officers both at regional level and by There for You nationally check the website or call the team in London.

Other learning opportunities

Some regional welfare committees and forums hold open meetings where welfare officers come together to share best practice and learn from each other. They also organise their own one-day seminars.

As long as you are recorded on UNISON's database as the branch welfare officer then you'll receive information about other ad hoc training events as well as the seminar for welfare officers from all 12 regions of UNISON.

Introduce yourself

Introducing yourself to key staff and branch reps that you may come into contact with in your role is a good way of getting yourself known. A friendly email will get things off to a good start and could cover matters such as:

- What your role is in supporting UNISON members.
- What you can do for them.
- Suggestions for working together.
- Offering to attend any 'Wellbeing' or other type of staff event that the employer might be organising to highlight the support available from There for You.
- Training that you'll be undertaking and what it entails.
- Availability to meet up.

Facility time

To fulfil the role properly you need to have appropriate time to devote to it. You may not get any 'facility time'; if you do it may not be as much as you would ideally like right away and, the process of negotiating with your employer can be lengthy and ongoing. Your branch secretary and paid officer with responsibility for your branch should support you in these discussions. However, if you've already sent an email introducing yourself, then hopefully this will help pave the way for a positive outcome.

- Explain your new role to your employer and the benefits There for You brings to both the individual and their organisation.
- Negotiate with your employer for some space at work to meet people and some time to do your job as a branch welfare officer.

- The more the employer sees that There for You helps to keep people at work, the more likely they are to give you facility time.
- Being a branch welfare officer is a voluntary role and you will only have a limited time to spend on it. This is normal. If you can't give the member the time needed, that is fine as long as you pass the case to the national office. The member must go on being helped in a timely fashion.

Familiarise yourself with the benefits that come within your terms and conditions of employment

Of course by the time you've completed the branch welfare officer e:note you will already have a good idea of what we do. However, it's as important to familiarise yourself with any benefits that your members can access via their employer.

For example, some employers now offer a range of health & wellbeing services under what is commonly referred to as an Employee Assistance Programme [EAP]. Counselling, health checks/screening, staff loans and advances on salary are typical of many such schemes so it's important that you have an easy to find list of the employment benefits members have access to.

Wider benefits of UNISON membership

Also find out about all the other benefits of UNISON membership that may be useful in your role such as:

- Legal services
- Rulebook benefits
- UNISON Living – in particular the pre-paid card which can provide significant savings on everyday expenditure.

TIP



You do not need to memorise details of other organisations you just need to know that these services exist and where to find information. Check out our website and 'Directory of Organisations'. For more details

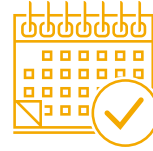
Make a plan!

Finally, having a plan will make life so much easier so, after you've read these guidelines make a to-do list of everything you want to do. You can build a rough time plan for the next 3 months or, the whole year. Most importantly, be realistic. Don't make a list that's so long its unachievable. A step by step approach that focuses on ensuring members are aware of the help and support available through There for You is a good starting point.

To help you get started, on [page 25](#) we have put together a suggested 'Action Plan'.

ACTION PLAN

Example



FIRST MONTH

- Establish an appropriate space to meet members, make phone calls and store member's information securely.
- Make sure RMS/WARMS (UNISON's membership database) knows your details. Remember, your branch should record you on the UNISON database as the branch welfare officer. Also, check you have given the appropriate permissions to receive information otherwise, nothing we send via email will reach you.
- Contact your branch office to order resources such as leaflets etc.
- Find out dates of branch meetings and ask for There for You to be on the agenda.
- Contact your regional office to let your regional welfare lead know you have been appointed, find out about regional events and let them know when you have completed your training.
- Find out information on national events e.g. AGM, fundraising events so you can discuss these with the branch.

SECOND MONTH

- Go to a branch meeting and tell them about your role.
- Start to develop a local resource list.
- Let members know you are available to them and what you can offer.
- Advertise our services in the branch newsletter and put posters up on all staff noticeboards.
- Ensure reps know how to contact you.

THIRD MONTH

- Keep contact with members record sheet up to date (monitoring form).
- Attend branch meetings.
- Keeps resources up to date.
- Check There for You website monthly for updates.

CHECKLIST

Getting started



- ☐ **Have you** completed both the Branch Welfare Officer and Data Protection e:note?
- ☐ **Have you** signed up to attend the branch welfare officer induction training? You need to complete the training to become 'accredited'.
- ☐ **Do you** have a quiet and discreet place to meet members and to do your welfare work?
- ☐ **Do you** have a phone that members can call you on and leave messages?
- ☐ **Do you** have secure storage space and shelf space for any reference materials?
- ☐ **Have you** worked out how much time you need to give to your new role?
- ☐ **Do you** have access to a computer?
- ☐ **Have you** ensured that you have all existing material and files?
- ☐ **Have you** familiarised yourself with any ongoing cases?
- ☐ **Have you** got a clear and simple system of filing?
- ☐ **Have you** spoken with your employer about your new role?
- ☐ **Have you** spoken with your predecessor as welfare officer?
- ☐ **Have you** made contact with a caseworker at the national office?
- ☐ **Have you** made contact with your regional welfare lead officer?
- ☐ **Have you** familiarised yourself with any benefits/welfare services offered by your employer and, the wider benefits of UNISON membership?
- ☐ **Is information** now coming to you as the named welfare officer?
- ☐ **Remember**, you need to get your branch to record you on the UNISON database as the branch welfare officer. Also, check that you have given the appropriate permissions to receive information from UNISON – otherwise nothing we send via email will reach you.
- ☐ **Have you** found out when and where there is any training or seminars you can attend?
- ☐ **Do your** branch reps and officers know about your new role?

SECTION 6:

GOOD

PRACTICE

- 28 Confidentiality
- 29 Personal safety
- 30 Insurance
 - Equal opportunities
 - Complaints
 - Knowing your boundaries
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 - Expenses
 - Branch welfare funds
 - Managing the role – job-sharing
- 32 Record sheets
- 34 Checklists

In this section we will look in detail at various practical issues of the branch welfare officer's role. This section is essential reading for branch welfare officers as it contains vital information on the standards of work and behaviour that There for You requires of you. It also contains valuable guidance on how to get the most out of your new role, how to operate safely and who can help you with any difficulties.

Confidentiality

The principles underlying our position on confidentiality are:

- Confidentiality is a vital part of our service.
- Members are entitled to have their contact with There for You treated with respect and in confidence.
- Under the General Data Protection Regulations [GDPR], members have the right to know what information is held about them, to access any records kept about them, to change information that they believe to be inaccurate and to know why you are seeking information and what it will be used for.
- Without assurances of confidentiality, members may be reluctant to provide information, or to make contact at all, which will restrict our ability to deliver appropriate and effective services.

Clearly you will often need to refer to the national office about enquiries and cases, and you may occasionally be absent and need to have a temporary cover. For these reasons confidentiality is maintained within the organisation rather than with individual branch welfare officers.

Notes & record keeping

Good record keeping is very important for a number of reasons. It helps you deal with cases, take notes in a way that suits you, it can help There for You to monitor and to evaluate the service we are providing

and, it may be important in any complaints procedures e.g. about a decision on an application.

- Notes about nearly all enquiries should be made and filed. A report record form template is included at the end of this section and is also available to download on our website.
- Keeping a record of all issues raised allows you to summarise the sorts of help you have been able to provide members with when making a report to your branch committee.
- Members who you meet with your welfare 'hat on' should be informed that any notes you make will remain confidential.
- You should tell them that these notes are kept for internal use, follow up, statistical purposes and to allow you as the branch welfare officer to keep track of different cases.
- All confidential notes and files will be destroyed after a fixed time.

TIP



Keep a record of who has spoken to you and what kind of help they asked for. Forms to keep notes of meetings with members as well as a summary of welfare activity in the branch are available to download. Examples can be found at the end of this section.

Storage & access

Any document containing personal information should always be treated as confidential, and all confidential information should be securely stored.

With physical records, this means keeping them locked securely away and making sure that access to these records is limited to yourself or the person who assists you in this role.

There are **five key points** that you should make clear to any member enquiring about our confidentiality standards.

1. Any information they give remains confidential within There for You. No information will be passed to any third parties or any other UNISON members without their permission. Unless you think they or someone is in danger, you must then tell the individual that you are going to contact national office.
2. If information is passed on to an agreed external agency, it will be on a "need to know basis".
3. Data is handled in a way that is consistent with GDPR.
4. Information will not be discussed within the branch at any meeting or with other officers other than with their permission.
5. Individuals may request a copy of There for You's confidentiality policy at any time.

Use your common sense and don't leave documents lying open on your desk or where others could read them.

With information on a computer, this means ensuring that it can only be accessed by a password and that information is not left visible to others on a monitor screen.

Destroying records

Your case records should include a copy of any application for financial assistance up until the point when a decision has been made and notification received from the national office staff that the file has been closed. At that point a summary should be made of the assistance, advice or referral given and the record form completed. The application form must then be destroyed. Ideally you should use a shredder or other secure means of destroying documents. You should contact the national office if you don't have access to a safe means of destroying records.

The financial assistance application form

You should make clear to anyone applying for financial assistance that the form will only be read by yourself and the caseworkers and staff at There for You, and should check with them about any potentially sensitive details included on the form. Remember also that applicants have the right to read any information that you might add.

It is very important to draw an applicant's attention to the Data Protection statement and Letter of Authorisation which on signing, gives consent to There for You contacting other charities or external agencies where it's felt they may be able to provide assistance. You should make clear to applicants that in these circumstances only relevant information will be given on a 'need to know' basis.

Conversation & discussion

It's essential that you do not discuss real cases casually with people outside of There for You, even with someone you think has no connection to the workplace. Even if you change names or certain details, it is amazing how easy it is for someone listening to your conversation to realise who the people concerned really are, particularly if they happen to be connected to the situation in some way. It is also amazing how quickly talk can spread and get back to the people concerned.

You may sometimes want to talk about a case in order to publicise your role and the services of There for You. In such a situation, you should be extremely careful not to mention any names or personal details and to modify the material so that it cannot be traced to any individual member.

Everyone has days when they feel exhausted or frustrated, and everyone can feel the need to get their stresses off their chest by talking with someone. This is completely fine so long as the process of letting off steam doesn't lead to letting out confidential information.

We recognise that given the essential frontline role you perform, branch welfare officers require opportunities to talk and reflect on the work that they do.

TIP



The national casework team is always there to talk over a case and provide support to help you keep the issues and any difficulties you face in perspective.

Emergencies

The only situation in which There for You would ever consider giving information to another organisation is when the member or a dependant is in immediate personal danger. There for You has produced a Crisis Policy identifying how to deal with situations where a member may be expressing suicidal thoughts or feelings, which is available to download on the There for You section of UNISON's website. Breaking confidentiality is a very serious matter and all possible consequences must be taken into account before taking this step. There for You will always first encourage the individual to contact third parties themselves, or to give us explicit permission to do so on their behalf. For further information, branch welfare officers should keep a copy of our 'Confidentiality Policy' which is available on request or to download.

Personal safety

It is important both for you and the member who is often in a very vulnerable state, that strict procedures are stuck to, to ensure everyone's safety and comfort. It is essential that you keep yourself safe at all times.

- Do not visit members at home. If you think a home visit is needed always ask someone at national office before you go. They may help you to find a different way to manage the case.
- Make sure your meetings are made in a public/work space and that you are not left alone in a building with someone.
- Do not arrange meetings outside of There for You office hours [9.00am – 5.00pm].
- Agree in advance with the member when the meeting will end.
- Always tell someone else exactly where you are going to meet and when you expect to return.
- Have a method of communication to hand e.g. mobile phone.

- Follow your instincts and leave if you do not feel things are quite right or if you do not feel in control of the situation.

Even at your branch premises or at your workplace, your security needs to be considered. In any situation, your own safety should always come first.

Insurance

In order to be covered by UNISON's personal liability insurance, you must follow the rules for:

- Personal safety
- Confidentiality
- Advice giving
- Note and record taking.

Equal opportunities

There for You is committed to offering an equal opportunities service that does not discriminate on grounds of race, religion, gender, age or disability. As a branch welfare officer you need to recognise that you may not feel a personal liking for every member you meet. Likewise, some members may be uneasy with you or take against you for no apparent reason. This is just human nature, but you must not let it interfere with your professional handling of their case. You must be compassionate and patient and try to understand and help all members, including those that you don't feel particularly close to.

Some members may prefer to talk to someone other than you. For example, they may be uncomfortable talking with someone of the opposite gender about personal health issues or about domestic violence. Some elderly members might be uncomfortable asking for assistance from someone who is much younger than them, whilst young members may feel uneasy talking about some issues with someone who is much older. It is important that you do not take this personally.

If a member wishes to deal with someone else, you must respect their wishes. Talk to a caseworker at the national office; you may have a colleague who can take your place or there may be a more suitable external agency. For example, in a case involving sexual assault, a referral to a rape crisis centre would be the best way to provide expert counselling and advice to a member who would naturally be reluctant to discuss their situation.

In the branch team in which you operate, you will need to establish how to deal with instances like these. You may have colleagues who will take your place for

example young members officer, LGBT officer, disabled members officer, retired members officer etc. This will ensure all members can access our services in whatever way feels most comfortable for them.

TIP



Where a member feels particularly uncomfortable about a branch rep knowing their personal circumstances alternative arrangements can be put in place such as inviting the member to apply directly to There for You or, asking another volunteer who is unconnected with the branch to assist the member with their application.

Complaints

There may be times when members are unhappy about the help they've received or perhaps you are dissatisfied with the service or support that's been offered. Whilst complaints are rare, we are committed to providing a quality service and recognise that occasionally we get things wrong.

In such instances, our first step is to try and resolve the issue informally. However, if we can't do this, then there is a formal complaints procedure in place which can be viewed on our website or email thereforyou@unison.co.uk.

Knowing your boundaries

Objectivity and detachment are valuable to any branch welfare officer. Being able to set boundaries so that you can maintain proper relationships – friendly yet professional with a degree of distance – will help both you and the member in the longer run. It would be very easy to get over-involved with other people and their problems, particularly when those problems are deep-seated and complex. Getting so tied-up in members' lives that they feel they cannot make decisions without your help only increases their feelings of powerlessness. It is right and important not to get over-involved both for the member and for you. Sometimes the best you can do is help make the situation clearer and you will not be able to 'solve' the problem every time. Keeping a sense of what is really practical is healthy – sometimes you can only help people live with what they have got. Make sure you leave the problems and the members with whom you are dealing behind when you step out of your role as branch welfare officer. If you can do this, you will be a more effective helper as a result.

Support

Working with other people and the problems that they face can be rewarding and empowering. But there will be occasional days when it can also be exhausting or worrying. In order to stay positive about the valuable work that you do as a branch welfare officer, it is best to have a support system that will enable you to keep the issues and stresses you face in perspective since it's important that you do not carry other people's problems or worries and that you limit the extent to which you get personally involved.

- Find someone you can talk to about the stresses and strains without disclosing personal information.
- You can do this by calling the national office and talking to a caseworker.
- Getting to know other branch welfare officers and members of your regional welfare committee or forum through the regional welfare lead is also a great way to build up a support group who know the kind of issues and situations that you face.
- Regional welfare training is a good place to share your experiences, stresses, develop new techniques and to give and receive support.
- The national seminar organised by our staff is another place for branch welfare officers to meet, share experiences and support each other.

TIP



There for You recognises that given the nature of the front line work that you do, branch welfare officers need to have time and space to think and talk about how they feel and to be able to reflect on the cases in hand. The casework team in the national office is always available if you ever want to talk over a case or its repercussions.

Expenses

Your branch and There for You has an expenses system. The branch will pay for your travel and any out of pocket expenses related to your role. Your training will also be paid for by your branch. As branches will adopt their own local protocols within the rules of UNISON, you need to ask your branch about this before committing to any expenditure that you might expect to be reimbursed as this will affect how you manage your role.

Branch welfare funds

This is not the same as There for You financial assistance. Financial assistance for members must come from There for You the charity and not the branch.

Branches only need small funds for additional items such as flowers/vouchers to give members when unwell or bereaved. **Branch funds must not be used for any financial support and there are specific rules laid down by UNISON on this issue which your branch treasurer will be aware of.**

Managing the role – job sharing

This is an ideal role to be undertaken as a job share. This is particularly helpful in large branches, and/or where there are numerous employers or work sites, and/or where people are working a shift system. This will enable members to access a branch welfare officer easily.

Some branch welfare officers may be more interested in a particular part of the role such as promotion and others in talking with the members. This is another good way to divide the role. It is important that you feel comfortable as a branch welfare officer and that you do the parts of the role that suit your skills.

A useful way to involve other members in There for You activities is to have other welfare contacts in the branch who can help you with some of the tasks, learn the role, be there in your absence and ready to take over if you ever choose to step down.

Interview record sheet

Date:

UNISON Branch Welfare Officer Guidelines 32

Activity in the Branch

[illegible]

CHECKLIST

Confidentiality



- ☐ Do you have lockable storage space?
- ☐ Is the key or combination secure?
- ☐ Have you left any physical files, paperwork or computer records open on view?
- ☐ Are you drawing all applicant's for financial assistance attention to the relevant statements on data protection?
- ☐ Are you checking with all applicants' about any potentially sensitive information that is included on the application form or that will be in your report?
- ☐ After There for You has dealt with an application, have you made a summary and securely destroyed any copies of the form or supporting paperwork in your possession?
- ☐ Do you have access to a shredder or other secure means of destroying documents?
- ☐ Have you made sure not to discuss cases with anyone outside of There for You (other than where the member has given permission for you to do so)?
- ☐ Have you read and understood the organisation's policy on confidentiality?
[Note: As all policies are subject to regular review, every now and then you should check on our website to see that you hold the latest version.]

CHECKLIST

Knowing your boundaries



- ☐ Know when and where you are going to make yourself available to members e.g. weekly, drop-in sessions, fixed days/certain times of the day.
- ☐ Know how much time you are going to dedicate to one member or each meeting e.g. maximum of 1 hour per meeting. To manage members' expectations, let them know how long the meeting will last and when there's 10 minutes remaining. This will allow you time to round up the meeting and end the conversation at a suitable point.
- ☐ Know when to refer the member onto someone else e.g. signpost for more expert information or, when you have lack of time due to work pressures you can refer to national office. Do this as soon as possible.
- ☐ Consider making a separate welfare officer email account to avoid members contacting your personal or work email account on welfare-related matters. Make sure to check this frequently and that your branch is aware that you have done this or whether they have a protocol on such matters.
- ☐ You should also set an automated reply message that tells the recipient:
 - Your general availability.
 - How soon they can expect to hear back from you.
 - If it's urgent who else they can contact i.e. There for You.
 - If you're away on holiday the earliest date that you will read their email.
- ☐ Ask if your branch would provide a dedicated phone for use in your branch welfare officer role. Ensure your recorded answer phone message tells members:
 - How soon they can expect to hear back from you.
 - If it's urgent who else they can contact i.e. There for You.
 - If you're away on holiday how soon before you will read their email.
- ☐ Don't talk about your own personal life experiences directly when talking to a member with your welfare officer hat on.
- ☐ Meet members in a neutral, accessible and private space, such as the trade union meeting room or cafe. Do not meet members in their or your home.
- ☐ Be aware of your personal safety and always tell someone else exactly where you are going to meet and when you expect to return.
- ☐ Follow your instincts and leave a meeting if you things are not quite right or you do not feel in control of the situation.

SECTION 7:

OUR SERVICES

& MANAGING

ENQUIRIES

- 37 Eligibility
 - Our services
- 38 Other services
- 39 Handling enquiries
- 40 Flowchart

In this section we look at the services we offer, how you will manage enquiries and who we can help.

Eligibility

The following table sets out who can use our services.

UNISON

- Current members
- Retired members
- Unemployed members (for 2 years after dismissal or redundancy) in line with charity's criteria*
- Student members
- Dependants or partner of a deceased member

UNISON EMPLOYEES

- Staff who pay a regular contribution to the charity.

Our services

Financial assistance

We provide short-term financial assistance to act as a safety net for members and their dependants who are facing unforeseen hardship according to our criteria.

We explore this in more detail in **Section 9** where you will find comprehensive information about how to access financial support, the application process as well as how applications are assessed.

Debt Advice

Falling into debt or struggling to meet debt repayments can often happen when circumstances change. People can rely on borrowing money to make ends meet which can become a problem when it is no longer affordable and other essential costs become difficult to pay. When supporting members in this situation, you may find that the true picture of their finances will not be known straight away. It may take a few discussions before you know the full details – this is not because the person is trying to hide things or be dishonest. Usually it's because they have not allowed themselves to think about the whole picture because this could be too distressing. Ensuring your member is signposted to expert advice is critical as professional debt advisers are skilled in teasing out all the relevant information and exploring the various options that may help in resolving the problem. UNISON Debtline can help in this situation and you should refer members immediately if it's apparent that debt is the issue. This can be done at the same time as requesting financial assistance.

IS DEBT ADVICE NEEDED?

If, in conversation, a member says anything along the lines of the following statements put them in touch with **UNISON Debtline 0800 389 3302** for immediate, free, confidential help on debt and budgeting.

- "I can't manage day-to-day without borrowing some money"
- "I find myself using my credit card for essential purchases, like food and bills"
- "I'm falling into arrears"
- "I'm behind on loans secured on my home"
- "I can't make repayments on loans or credit cards"
- "I'm being contacted about unpaid bills or missed payments"
- "I'm relying on quick fix short-term loans"
- "I'm borrowing from friends or family"

Wellbeing Programme

Wellbeing breaks are there to help members and their families who, because of difficult personal circumstances, may benefit from a short break but do not have the finances to pay – for example from caring responsibilities, help in recovering from a traumatic incident or suffering a terminal illness.

Signposting and referral

Another very important part of our service is to offer advice about external organisations and agencies. Knowledge about the appropriate agencies in your area will make you a vital resource for your members. Similarly, an awareness of the types of statutory benefits available as well as those provided through the local authority in the area where the member lives will mean you can refer members directly to the right place for specific help.

There for You has produced a directory of useful organisations to help you in your role. The directory also includes space for you to record information about any local support organisations that you come into contact with.

TIP



If a member is struggling with debt or perhaps in conversation makes a remark along the lines of any of the statements referred to above, put them in touch with **UNISON Debtline 0800 389 3302** for immediate free, confidential help on both debt and budgeting.

TIP



Here are some suggestions on what to say to your employer:

"Working together we can help reduce absenteeism/ or help with meeting your duty of care to staff"

"In the current economic climate and times of uncertainty There for You provides services that can help staff to cope and therefore enable them to concentrate on their job and work"

"Can we promote the service at staff induction days and reference in the staff handbook?"

"Can we include information about There for You on staff payslips?"

Check out the website where you will find our information guide 'Directory of Useful Contacts'

You can also refer to UNISON's guidance on facility time

Being a sign-poster is one of the most important parts of the branch welfare officer's role. You are not expected to know how to solve problems or, to be able to offer specific advice but, knowing where to turn to and directing the member is an invaluable service.

Listening and support

One of the most important ways we help is by being a listening ear for someone. Often, just sharing a problem makes all the difference.

Remember, we offer a confidential service within the organisation and will only ever contact others for advice with members' agreement.

There for You staff and regional welfare committee and forum members are all there to both support members directly and, offer you advice and support in relation to your role.

Other services

Credit Unions

Sometimes when faced with unexpected expenditure that overstretches our budget, people can be tempted to take out an expensive payday loan. Or, for some, Traditional forms of banking doesn't offer the flexibility needed to budget effectively. Credit unions are an alternative to bank or borrow and branch welfare officers can signpost members to a directory of credit unions on our website.

Food banks

In recent years There for You has received an increasing number of requests on behalf of members needing emergency help to buy food and pay for fuel. Whilst emergency help is available, branches and branch welfare officers should be aware of local support that is available so that when dealing with an emergency, branches have a system in place so that they can directly refer their member to a food bank if appropriate.



An advice guide on how to go about registering with your local food and fuel bank is available to download

Joint funding – arrangements with other occupational benevolent funds

There are other charities like There for You who can provide financial help to people plus other services. We work closely with a number of charities for the purpose of trying to secure the best package of support that we can for a member.

Benefits checker

Every year, many of our members will miss out on benefits and tax credits potentially worth millions of pounds. You can signpost or help members check their entitlement by using our online benefits checker. This will quickly and easily identify any benefits you can claim to help increase someone's income and improve their situation.



Go to website to check benefits

Information guides

There for You also produces a range of advice and information guides covering topics that relate to many of the requests we receive for financial assistance. These include guides to 'Arranging an Affordable and Meaningful Funeral', 'Help with Energy Costs' etc. These guides are useful sources of supplementary information both for your own reading and as handouts for members who ask for help.



Go to website where you will find all guides available to download

Charities we have joint funding agreement with or refer members to

- Cavell Nurses
- Turn 2 Us
- Glasspool
- Education Support Partnership

Charities that we apply or refer to for members with relevant employment connection

- Civil Service Benevolent Fund
- TASC The Ambulance Service Charity
- Social Workers Benevolent Fund

Handling enquiries

Understanding the type of enquiries you may encounter

As a branch welfare officer, you will be asked by members for help with a variety of problems. In many cases, getting the right information from the person making an enquiry isn't always straightforward and sometimes, the problem that is presented initially is not the issue that needs work. For example, financial difficulties can be the initial issue presented to the branch welfare officer but a gambling habit that has got out of control could be the root of the problem.

Researching what can be done and referring on

You are not expected to be an expert on everything yourself. In many cases, the best thing you can do is to signpost the member to a suitable source of further help or information. For instance, using the example above, finding appropriate assistance by referral to a relevant organisation to help with gambling or stress management could deal with the cause of the financial difficulties being experienced by the member. If debts have accumulated as a result of the gambling then referral to UNISON Debtline is another option.

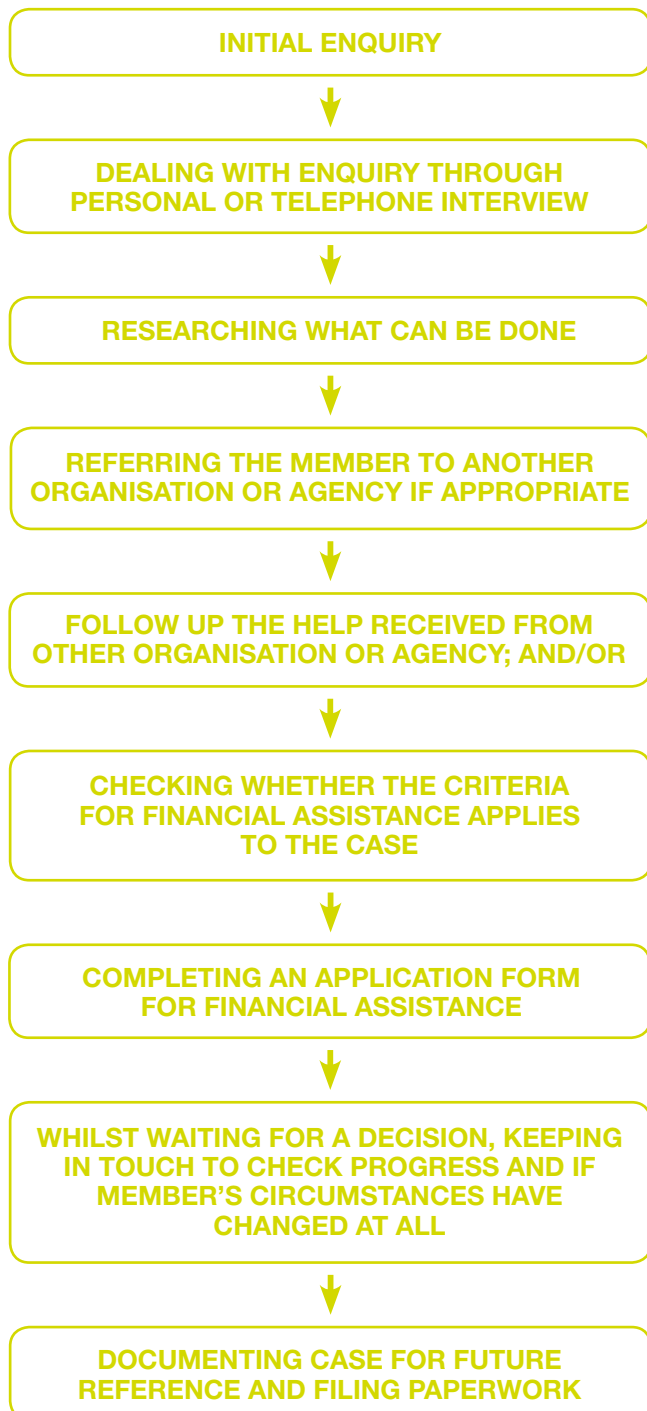
Follow up

Keeping in touch by checking-in with the member to check that they are receiving appropriate help is a vital part of your role. By doing this, you are better placed to decide if and when an application for financial assistance might be appropriate. For example in this case, it might be that through gambling, the member has ignored warnings to pay his council tax so an application for financial assistance might need to be made at the same time.

The case studies in **Section 10** illustrate some of the typical kinds of issues that you might encounter.

Handling enquiries flowchart

You can see from the following flowchart that not every approach to There for You will result in an application for financial assistance. Here is a typical pattern of the help you may give.



SECTION 8:

COMMUNICATION

& INTERVIEWING

SKILLS

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be feeling

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In this section we will look in detail at the interview process and at the skills and techniques that make for effective communication. For many members who seek our help, talking about their problems is difficult and a first meeting can be a stressful occasion. This section is intended to give you an understanding of the best way to conduct interviews so as to make them comfortable and effective. We will look at both the practicalities of arranging a meeting and at the communication and listening skills you will need to develop. There is a checklist at the end of this section to help you understand the best way to go about meeting and talking to members in need of support.

Managing the initial enquiry

When a member first makes contact it may be for any number of reasons. They may:

- Immediately enquire about the possibility of financial assistance without making clear their personal situation.
- Just enquire in broad terms for advice on an issue without raising the possibility of financial assistance.
- Overwhelm you with too much information.
- Be guarded and difficult to draw out.

At this first stage of enquiry, the full complexities of a case will not always be clear, and members may be initially reluctant to reveal all the issues involved. Whilst you may naturally be interested and concerned to know more, you should be careful not to be too inquisitive at first as this might intimidate or embarrass members if they are not yet ready to discuss their problems in detail. Your role may simply be to listen.

The key things to make clear at this stage are:

- That There for You is a confidential service [section 6 on confidentiality refers].
- That you would be happy to research the issue and look for other organisations that might be useful to them, or refer them or their enquiry to the national team where appropriate.
- Suggest that if they are interested in the possibility of financial assistance that you could arrange an interview (either in person or on the phone). You should also make clear that the process will also involve exploring other help that may be available for example benefits, expert advice from another organisation etc.
- If they are enquiring about the possibility of financial assistance, you should make clear that it could only be offered if no other form of financial assistance is available see **section 9** on criteria for financial assistance.

Starting on the right footing

Many cases will require more than one meeting or contact with a member. At the initial enquiry, you will largely just be getting to know the member and putting them at ease as they describe their situation or problem.

Starting on the right footing from the outset of every case is very important, as it will tend to set the tone for any subsequent meetings. This means maintaining a non-judgemental attitude, listening well and making supportive suggestions as to how and where members might gain advice and assistance. It also means not raising unrealistic expectations about how we can help.

How might the member be feeling?

When preparing to meet with a member, you should always try to put yourself in their shoes and consider how they are feeling. If they have approached us for help they will almost certainly be worried and anxious about their personal situation. On top of this, most members will naturally be nervous or wary about talking about their problems. For many members, just admitting to someone else that there is a problem will be a big step that has taken a huge effort on their part.

Instead of dealing with a problem straight away, people often let it grow into a real crisis because they are worried by what other people will think and say about them; i.e. by people judging them. It is vital not to discourage a member who has worked up the courage to seek help with their problems by sounding judgemental or disapproving.

Arranging and preparing to meet

It is important that you meet members in the right kind of environment. If you can try to find and reserve a room with enough space and which is quiet and private for a couple of hours. You should try to avoid meeting for longer than an hour, however you can use the extra time to make notes or complete any paperwork and to gather your thoughts.

Preparation

You should always be fully prepared when meeting a member. This means:

- ✓ Reading all relevant details and information about an ongoing case.
- ✓ Looking up a member's case history if they have used the service previously (you can check this with the national welfare team).
- ✓ Researching a subject that you already know to be relevant to the case so that you can have useful information to hand.

- ✓ Preparing your general resources for the meeting, such as: writing equipment, paper, UNISON information, details of local agencies, benefit leaflets, tissues, water etc.
- ✓ Planning out some of your questions in advance. You will need to ask certain questions to make sure you fully understand the situation, and to find out whether for example the case is suitable for an application for financial assistance, a referral to UNISON Debtline, signposting to other organisations or, a combination of all of the above.

Gaining trust and confidence

For an interview to be successful, it is vital to gain the member's trust and to feel confident. It is normal to feel a bit nervous before meeting a member for the first time, particularly if you are new to the role. However, the member will almost certainly be more nervous than you so it is important to try and relax and make them feel relaxed in turn.

Techniques for relaxing

Take a few deep breaths before you sit down to talk. The best way to relax is often to concentrate fully on helping the other person to feel at ease. This will take the spotlight away from you and allow you to hide any nerves or tension until you have settled into discussing their situation properly.

A useful trick is to sit across the corner of a desk or table rather than sitting directly opposite each other. This helps to create a more relaxed, informal atmosphere while still allowing you somewhere to put your documents where you can see them and write on them. In this position you can pay full attention to members without making them feel that they are under scrutiny or being tested.

Supporting members by phone

On some occasions you will have to make a decision about whether to meet a member face-to-face or talk to them on the telephone. Sometimes it will be the only way that is convenient for the member to talk to you or for you to talk to them.

Telephone interviewing can seem more nerve-racking to some, but it can actually have advantages over face-to-face meetings especially as some members may be more comfortable with the anonymity of a phone call than talking face-to-face.

Advantages

- Quicker and a better use of your time.
- More convenient and cheaper for you and the member concerned as there is no traveling.
- Better suited to shorter conversations.
- Can focus more on your tone of voice and language.
- May be a better option if there is no suitable private place available to meet a member.
- Can be more convenient if you are working from home or at a different location.
- Some people find it easier to talk about personal issues over the phone as they feel more anonymous and there is no eye contact.
- If there is information you don't have to hand, it is easier to go and find it and then call them back.
- Easier to take notes whilst listening without putting the member off.

Disadvantages

- You cannot see their facial expressions or body language, so there are fewer clues about how the member is feeling.
- Can feel impersonal and difficult to establish a rapport and let the member open up.
- Some people are not good at or dislike talking over the phone.
- Can be difficult to find the right time to call so that it remains confidential and the member has no fear of overhearing.
- Can be difficult to refer to your notes and materials as well as listening to the phone.
- It is more difficult to talk for a long time without seeing the other person, so it can be harder to get the full picture and talk of emotions is harder than factual exchanges.
- Not possible to directly show the notes made during the interview for the member to agree so it must be done verbally or by email.
- Application forms cannot be signed, or leaflets handed over.

From the table above, some clear pointers arise for getting the best out of telephone interviews specifically:

- ✓ Try to eliminate all background noise as far as possible. If it is difficult to hear what is being said then it will be much harder to gain the member's trust.
- ✓ Work hard at making your voice sound interested and receptive. Smiling while you talk will make you sound more positive and friendly.
- ✓ Even on the phone, keeping your body language alert is important. Try sitting up straight or even

standing as this will affect your tone of voice.

- ✓ Anything that needs to be agreed must be read out word for word.
- ✓ Check more often than you would normally that you fully understand what has been said by summarising the main points.
- ✓ To ensure that everything is clearly agreed between you, send an email/letter laying out everything you have just decided together. This will ensure there are no misunderstandings later on.

TIP



- You should always ask the member which method of interview they would prefer and try to meet their wishes.
- Keep calls within normal office hours as this will ensure There for You staff are available to contact in the event you have any serious concerns about the person's safety.

The interview process

Interviewing could be described as an exercise in gathering information. All interviews take place so that specific details can be collected therefore it is very important before going into any interview to decide what information you want to gather.

This point has been widely examined in the past and a recognised pattern of questions has evolved. They are known as the five W's.

Who – The details we need about the person applying

What – What is the problem that has led them to seek your help?

Why – What are their family details, their history and the background of their problem that has led up to this point?

Where – Where/what problem do we need to look at first to be able to help them?

When – When did this all happen and how urgently do they need help?

Supporting members by email

Of course there will be times when email is the most practical and efficient way of communicating with members especially if either you or the person you're helping works shifts. To avoid sending emails that members may perceive to be cold or unfeeling, consider the following:

- **Be mindful of your tone.** Unlike face-to-face meetings or even phone calls, the member reading your email won't have the benefit of your tone of voice, or other non-verbal cues so attitudes can be misinterpreted. Aim to sound approachable and non-judgemental.
- **Keep emails brief and to the point.** Make your most important point first, then provide detail if necessary. If you make it clear at the beginning of the message why you are writing, your member is much more likely to respond to what you are asking. Long emails often get set aside to reply to later and can be forgotten.
- **Read your email before you send it** Our brains work faster than our two fingers and it is easy to drop a word or two as we rush to type out what we think. It's a good idea to re-read your messages to make sure that what is on the screen matches what you mean to say.
- **Don't write in ALL CAPS** THIS IS THE DIGITAL EQUIVALENT OF SHOUTING!
- **Use your spell-checker** Misspelt words gives an impression of carelessness and is easy to avoid with a spell-checker.
- **Pause before pressing SEND** Check that the email address is correct, you've included your contact details, that the message is marked 'Private & Confidential' and that no one else is likely to receive your email in error.
- **Reply promptly** This shows the member that you care even if you can't give them exactly what they want.

Starting the meeting and setting the agenda

The start is by far the most important stage of the meeting between you and any member. This is your chance to establish the relationship between you that will be helpful for the way you need to work with this person. It is a good idea to start with a bit of small talk to allow you both to settle and relax. For example:

*"How has your journey been here/to work today?"
"Did you have any trouble finding the room?"*

These are easy factual questions and will get the member talking.

Once the member is relaxed and settled enough to start the interview you need to clearly establish with the member what is going to happen and what the purpose of the interview is and set the scene to explain what can happen next. Here is an example of such an introduction:

"I am pleased that you were able to come in to see me. This time is for you to tell me about the difficulties you're facing at the moment. I may take notes and ask questions while I am listening, but this is just to understand fully and so that I remember the key points.

Anything you tell me will be in confidence and if we need to share any of it with anyone else then you will be fully informed about who and why it is necessary. However, we will never speak to anyone without your permission. We have up to (give time) to talk today but we may need to meet again or, speak on the phone or by email to discuss all the options available. Do let me know if at any stage you do not understand anything or want to ask me a question. If I don't know the answer I will let you know and where possible try to find the information you need."

Format of the meeting

In order to agree about how you are going to work with the member you initially need to reach agreement about what you are going to do. A little like having an agenda in a meeting which will ensure that you are both talking about the same issues.

The first part of the interview will be establishing why they have sought assistance from There for You. Two examples of the way this could be asked are:

"So tell me, how do you think I can be of help?"

"Can you tell me about the difficulties you're facing at the moment?"

Taking into account what has been said, the second part will then be a discussion of the options open to the member. You should make clear that:

- Your role is to discuss all the options and services available to the member and, if an application for financial assistance is appropriate, to complete the application form.
- You are not in a position to give them financial help there and then. Nor are you able to tell them whether There for You will be able to help them in the future.

For example:

"My role is not to give you professional advice or solve your difficulties. I am not in a position to be able either to give you financial help today or even say whether There for You will be able to in the future. What we can do is discuss all the possibilities open to you which could initially mean that I will signpost you to organisations that may be able to help. If an application for financial assistance seems appropriate, we can complete the form together. This may not all happen today so if we run out of time you can take the form away with you to complete and we'll get together again to go through everything".

Action planning

The point of interviewing members is to arrive at some kind of action that will help towards solving their problems. Being a sympathetic ear is useful, but most people will need a plan of action in order to really help themselves. The end of an interview should always be focused on what should happen next. This means agreeing the range of options available and decisions made. The action planned may not always be your preferred solution, but needs to be that which best suits the member.

TIP



There for You always tries to encourage members to choose and act for themselves. You should resist taking on a lot of practical work yourself. Whether it is making telephone calls or writing letters it is more empowering for members to undertake action themselves. That way, should the situation arise again, they will understand what needs to be done.

TIP



When making notes of the meeting you should always write down the agreed actions and confirm with the member (a follow up email is always helpful).

An interview record template can be found in **Section 6** which is also available to download.

Referring members on

If members wish to deal with someone else, you must respect their wishes. Talk to a caseworker in the national office; you may have a colleague who can take your place or there may be a more suitable external agency. For example, in a case involving domestic abuse, a referral to National Domestic Violence Helpline would be the best way to provide expert counselling and advice to a member who would naturally be reluctant to discuss their situation.

Communication

Language

Be aware that the language you use reveals a lot about your thinking. Calling an issue “a problem” may be quite off-putting. Sensitive members may assume you think that they are to blame if the issues facing them are labelled in this way, when they may have arisen through circumstances beyond their control. Try and find more neutral words such as “issue”, “the circumstances” or “situation”.

TIP



One helpful tip is to talk about the matter using the same words as those the members use themselves. Similarly the word “interview” could make some members feel that you are going to be sitting in judgement of whether or not they are deserving of support so using less formal words like “let’s meet for a chat and to discuss how I might be able to help”.

Non-verbal communication

Non-verbal communication plays a huge part in an interview, since how we say things is often just as important as what it is we say. In face-to-face communication, your tone of voice, facial expression, gestures and posture will all affect what the listener interprets you mean and whether they like or trust you.

Reflecting

A useful technique during a meeting is to reflect back to the member what has been said. A reflection is a brief statement of what you think the member has been saying. It is a bit like holding up a mirror so that they can think about what they have been saying. A reflection should always be offered tentatively. Always ask the member if they agree or disagree with what you have said.

Reflections typically begin with phrases like:

“You seem to be feeling ...”

“It sounds as if you think”

“So what you are saying is”

They’re useful because they:

- Show that you are listening and trying to understand.
- Help you to check that you have understood correctly.
- Give the member a chance to correct your understanding.
- Encourage the member to reflect on what they are saying.

Summarising

Summarising is similar to reflecting in that it is a statement of what you have understood the member to be saying. A summary is a short overview of what has been said so far and is a way of inserting a mini-conclusion into a discussion. It also allows the member to see how their situation sounds to you and can let them see more clearly the nature of their problem.

When summarising, you should try to pick out the key points and feed them back in a short clear statement. For example:

“It seems your health difficulties have caused unexpected spending and you’re feeling worried about how you are going to manage financially.”

Summaries should also be offered tentatively so that they can be corrected and adjusted. They are useful because they:

- Clarify both for you and the member what the key points are.
- Focus the member on certain points.
- Confirm that you have understood the overall situation.
- Can cut-short a member who is going off on a tangent or talking too much without seeming rude or uninterested.

Challenging sensitively

Sometimes you may feel that what you are being told isn't quite gelling together. You may want to probe the facts a little more deeply in order to check that what you have heard is correct. This is known as challenging and needs to be handled very carefully in order not to be seen as threatening.

Challenging should always be done with the intention of being helpful. It can also help the member to recognise inconsistencies in their account that they may not have noticed or admitted to themselves before. For example:

"You say you always pay off your credit cards and yet your debts are mounting. Perhaps you have only been paying off part of the debt each month?"

Listening

Being a good listener is a skill that all branch welfare officers should cultivate. Really listening to the details of what someone is saying, rather than merely getting the gist of what is being said requires switching to a different frame of mind from everyday chatting. When someone is speaking at length it can be easy to switch off, to nod mechanically or to repeat a few stock phrases.

Sometimes we can miss what is being said because we are already thinking about what we'll say in reply. Developing the ability to concentrate on what people are actually saying may take some time and effort but it is an invaluable skill that will help you communicate better both as a welfare officer and in general.

Here are a few more pointers to illustrate what can get in the way of effective listening:

- **Listening with sympathy** – This is a common and human response, but sympathy can get in the way of you working with someone and identifying the most appropriate next steps.
- **Interrupting** – Interrupting a person who is conveying thoughts and feelings is a common trait in conversations arising from enthusiasm, boredom, having something to say ourselves, not being able to wait, emotion or insensitivity toward the person who is speaking.
- **Silence** – At times the person may pause or not want to express words. There may be a tendency for you to fill the silence or space with a question or a response. That 'silence' can be precious for the member, and are non-verbal cues to observe without words.
- **Worrying about your next response** – If you are preoccupied you may stop listening and therefore not be attentive to what the member is saying. The key is to forget about a response and just 'be' with the member using the LAW rule i.e. if in doubt LISTEN AND WAIT.

What can I do to help myself listen?

- **Avoid distractions.** Concentrate on the member, watch their expressions and movements, stop phone calls, put previous or current work out of view.
- **Don't assume.** You'll never really understand what someone is really saying if you make assumptions – you'll only know what you knew already.
- **Stop talking!** Listen to the words and the way they are being said. Are there any emotional overtones? Is there any hesitation? This is just as important as the content.
- **Ask questions.** The only way you can check your understanding is by asking questions.

Questions

Asking the right kinds of question can make the difference between someone really opening up to you and the conversation closing down. You will find that most people are not used to talking about themselves. Often this can be a factor in their difficulties, for instance, someone in debt because they have not admitted to anyone the amount that they have spent. At the end of this section are some guidelines on the types of questions which are helpful, sometimes helpful or unhelpful.

How much should I be talking?

Probably the most common fault when dealing with an enquiry or conducting an interview is to do too much talking. Again, you should aim to switch to a different frame of mind from everyday conversation where each party will tend to speak for the same amount of time. When a member approaches you in your capacity as a branch welfare officer, your role in the conversation will mainly be to listen.

You may have a story about your own life which you think relevant or similar to the member's situation, but talking about yourself in this way is not appropriate here. Your role is to bring out the member's fullest description of their difficulties so that they can see their own situation as clearly as possible.

In general, you should try to refrain from giving any guidance until after the member has fully described their situation and difficulties, and even then you should continue asking for their opinions rather than focusing on your own experiences.

TIP



Follow the 80:20 rule. Let the member talk 80% of the time.

Reaching agreement and action planning

Just airing a problem with a sympathetic listener may be useful but most people need a plan of what to do next in order to help themselves. The end of each interview you conduct needs to be focused on what could and will happen next i.e. the options and the agreed decision.

The aim should always be to encourage members to be pro-active as in choosing what to do and acting for themselves. Resist taking on a lot of practical work yourself unless only you can perform the task. Whether it is making telephone calls or writing letters, generally it is more empowering for members to sort things out for themselves. That way, if the situation should arise again they will have understood the process and learned what to do. The Interview Record Sheet found in **Section 6** contains a space for 'actions agreed' that you can use for this purpose. Fill it in with the points agreed and give the sheet to the member but take a copy for your records first. An electronic version of this template is available to download making it possible to email to the member.

Developing your own style

Everyone develops their own 'style' at interviewing. There is no particular right or wrong way. As we have already mentioned, it is important that the member feels relaxed but it is equally important that you feel comfortable and at ease, as any tension will be apparent to the member which may make them feel uncomfortable or anxious about discussing their personal situation. If you're completely new to interviewing rest assured you will quickly perfect your style and establish an effective way of managing this important aspect of your role.

CHECKLIST



Preparation

- ☐ Have you checked that the person you're speaking to is a member?
- ☐ Have you read any relevant existing notes or files.
- ☐ Have you done some initial research e.g. looked for any useful external organisations or agencies that might be of help?
- ☐ Have you decided if a telephone interview discussion is appropriate or not?
- ☐ Have you arranged for a suitably private room or space to use?
- ☐ Have you got paper, pens, UNISON materials and any relevant leaflets etc?
- ☐ Have you got some drinking water and some tissues?
- ☐ Have you planned out in advance some of the questions you will want to ask?
- ☐ Have you confirmed arrangements with the member and given some indication about how long this discussion/interview meeting will take?

Meeting

- ☐ Have you explained There for You's confidentiality policy?
- ☐ Have you created a relaxed atmosphere and gained the member's trust?
- ☐ Have you agreed an informal agenda of what to discuss with the member?
- ☐ Have you made clear to the member what your role is?
- ☐ Have you asked all the questions that are relevant to an application for financial assistance if this is the purpose of the meeting?
- ☐ Are you making notes of the key points and information you need to remember?
- ☐ Are you making occasional reflections and summaries?
- ☐ Are you talking too much and are you really listening?
- ☐ Are you being realistic with the member and not raising false hope?
- ☐ Have you agreed an action plan with the member and whether/when you'll meet or talk again?

After the meeting

- ☐ Have you written up and securely filed all the notes you have made?
- ☐ Have you sent a confirmation email, text or letter confirming what was agreed at the meeting?
- ☐ If an application for financial assistance was made, have you taken and filed a copy before sending the application off?
- ☐ Have you spoken to the national casework team, if necessary, about the case?

CHECKLIST

Questions

Helpful questions	
Open questions: Invite the member to freely say what is in their mind. These questions begin with words like Who, What, Why, Where, When, How.	<ul style="list-style-type: none"> • How are you feeling about this situation? • Why do you think that has occurred? • Can you tell me how all this happened? • What do you think the important issues are here? • What seems to be the priority now? • What advice or help have you received from elsewhere?
Clarifying questions: Ask the member to explain more fully what they mean.	<ul style="list-style-type: none"> • I'm not quite clear about that could you explain a bit more? • Did this all occur at one time or was it over many months?
Linking questions: Refer to a topic that the member has already spoken about.	<ul style="list-style-type: none"> • You mentioned you had a health problem during the year, could you tell me some more about that?
Sometimes helpful questions	
Hypothetical questions These questions ask what would happen if something different were the case. This type of question can be helpful when thinking about how a member would like things to be, what the consequences of a decision might be and, when setting goals to achieve.	<ul style="list-style-type: none"> • If you could get help with childcare, would you feel able to return to work? • If the employer allowed you to work different hours might that help?
Closed questions These can be helpful when you are asking someone to confirm a fact and requires a "yes" or "no" answer.	<ul style="list-style-type: none"> • Can I just check that you said you first went off sick 2 months ago?
Unhelpful questions	
Leading questions Contain an unexpected answer or an assumption that can lead the member to give an answer they might not normally give. It can also sound like you are trying to put words into their mouth.	<ul style="list-style-type: none"> • So you took on extra borrowing. That was a mistake, wasn't it?
Multiple questions Are several questions asked in one sentence which makes it difficult for the member to answer easily and will just confuse matters.	<ul style="list-style-type: none"> • Did he reply and what did you do and how was it afterwards with your landlord? • How large is the debt and when is it due and what is it for?

SECTION 9:

FINANCIAL

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In this section we look in detail at when it might be appropriate to request financial assistance and how to go about making an application; how we assess requests for financial assistance; and, our procedures and processes. We also take the opportunity to address some of the most frequently asked questions.

Financial assistance

Criteria

There for You is a charity. The decisions it makes about who can and cannot receive financial assistance and the limits for financial assistance are agreed by the charity's trustees. The broad details are listed below however full and up to date details of the criteria are contained in our criteria factsheet which can be downloaded from the website. We cannot give money where the request does not meet our criteria however we will always give advice and support to any member or members' family who approach us.

Before making an application

As a charity we cannot consider an application for financial assistance where statutory help is available in the form of benefits or for items that there is a legal requirement on statutory services to fund. This means that where appropriate, applicants are required to look at maximising their income by applying for any benefits they may be entitled to before a request can be considered. As well as checking eligibility to state benefits, this includes checking any help that might be available through local authority schemes e.g. Local Welfare Assistance Scheme (England), Discretionary Support Loan or Grant (Northern Ireland), Scottish Welfare Fund (Scotland), Discretionary Assistance Fund (Wales).

When is it appropriate to make an application?

Although UNISON has many members who are on low pay or whose usual income leaves them struggling financially, the core criteria for applying to There for You is **'unforeseen hardship'**.

Ways we can help

- ☐ Living expenses whilst benefit applications are processed or help in adjusting to a reduction in income.
- ☐ Essential items such as household or disability equipment.
- ☐ Help towards property adaptations to meet disabled needs.
- ☐ Clothing for example where there has been weight loss/gain linked to ill-health or where a child needs clothing for school.
- ☐ Heating/utility costs where bills are higher than normal due to health or other reasons.
- ☐ Bankruptcy or Debt Relief Order costs.
- ☐ Preventing homelessness in extreme situations such as help to stop repossession or eviction action.
- ☐ Assisting with rental deposit – moving home in unavoidable and exceptional reasons e.g. domestic violence.
- ☐ Funerals – for basic costs and where all other help has been explored.
- ☐ Health related costs – prescriptions, travel to hospital.
- ☐ Wellbeing breaks such as following a lengthy period of time off work through sickness
- ☐ Emergency property repairs where the applicant is the homeowner.
- ☐ Following a disaster such as a burglary, fire or flood, where essential items are lost or damaged beyond repair and where there is no insurance.
- ☐ Emergency help where the applicant has no money (see Emergency assistance).

We can also provide help to source additional funding or support from other charities and organisations.

Where we can't help

- ☐ Overdrafts, credit card debts or loans – including loans from family and friends.
- ☐ Private medical fees
- ☐ Educational costs
- ☐ Legal expenses or fines
- ☐ Paying for anything that has already been bought or bills that have already been settled even if the money has been borrowed from elsewhere.
- ☐ Residential or nursing home costs
- ☐ Purchase of a car/house
- ☐ Travel abroad
- ☐ Headstones
- ☐ Deposits on rented accommodation – other than in specific circumstances.
- ☐ Financial difficulties that pre-date membership of UNISON.
- ☐ If the person has run out of money – other than if the circumstances were unforeseen (see emergency assistance).
- ☐ Hardship that has arisen as a result of taking industrial action.
- ☐ Counselling costs

For example job loss, ill health, family breakdown, disability, bereavement, caring for someone – all can lead to a sudden loss of income or increased expenditure impacting enormously on their personal finances. We are keen to help any member who unexpectedly finds themselves in this type of situation.

Completing the application form

Every application form for financial assistance must clearly explain:

- The applicant's financial circumstances.
- How their financial situation has changed.
- Why these changes are unexpected and could not have been predicted.
- What steps they have taken to find alternative help and support.
- Health, disability and family issues relevant to the application.

TIP



There for You has a small number of different forms in use at any given time and all have been developed with the input of our branch welfare officers. For the main 'Application for Assistance' form, there is also an advice guide that explains in detail what the questions mean and why we need the information.

Helping with the completion of the application form is an important part of your role so if you have an understanding of why questions are being asked you can then advise correctly on the completion of the form.

Branch welfare officer supporting statement and endorsement

As branch welfare officer, you can provide any additional information to support the application. If there are any factors that have put an unreasonable strain on the household or, any other information that you think adds to the application, you can explain this in a supporting statement to accompany the application form. You know the member concerned and the bare details on the rest of the application alone may not make the strongest case. A well completed application form is the most effective way of speeding up the progress of the application – we can handle the case so much more quickly if we can understand all relevant aspects of the member's circumstances.

Look at these two very different uses of a branch welfare officer supporting statement –

Version one states:

"This case is deserving of welfare support."

Version two explains:

"Without the help of funding, I believe this member's already precarious relationship with his partner may falter. They have been under great strain, having to cope with numerous hospital appointments at the same time as experiencing a reduction in their income. The employer is also closely monitoring his sick leave. They are receiving counselling and badly need some practical assistance in the short-term whilst benefit applications are being processed. This will help them face the future together despite the health problems ahead and ensure some of their immediate concerns are alleviated."

The branch welfare officer signs the end of the form to endorse the application as genuine and this is an important undertaking. If you have any concerns about whether the information you've been given is legitimate then always call and speak to a caseworker first.

Supporting paperwork

All applicants must provide documentary evidence in support of their application. Without this, their request cannot be considered. Essential documentation includes but is not limited to:

PROOF OF ALL HOUSEHOLD INCOME

- ✓ This should be the last 2 most recent payslips. If the applicant is living with a partner then similar proof of their income is required.
- ✓ If the applicant or their partner is claiming any benefits then proof of this must be submitted other than if this can be easily identified on their bank statements.
- ✓ Proof of all other income, other than where this income can be easily identified on their bank statements.

BANK STATEMENTS

- ✓ Copies of recent bank statements for all accounts held by the applicant and their partner that covers 2 consecutive months detailing all transactions prior to the date the application is submitted must also be included.

PROOF OF ALL EXPENDITURE

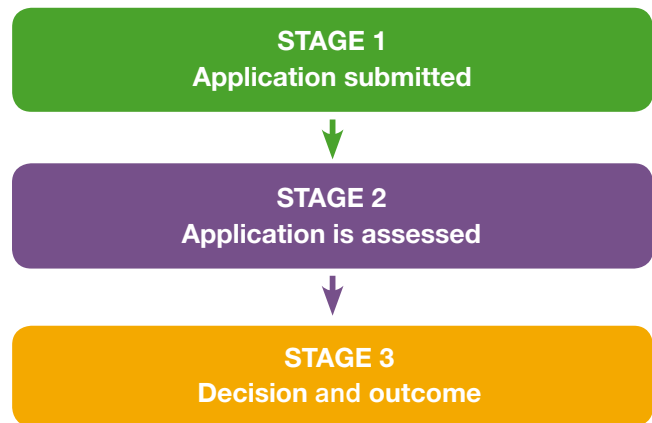
- ✓ This can usually be explained by annotating bank statements to explain all regular transactions. (Note: At assessment, applicants may also be asked to clarify any uncommon transactions).

Members with partners

Members who have a spouse or partner must include details of their income when applying. This is because most couples pool their incomes and share expenses – which may be higher. If a member is living as a couple with someone but fails to declare it then they are making a fraudulent application.

The assessment process

Assessments follow a 3-stage process as detailed below:



STAGE 1: Application submitted

On receiving the form, the Support Team checks that:

- ✓ The applicant has met the eligibility criteria.
- ✓ The application form is completed correctly and declaration has been signed.
- ✓ The form is complete i.e. all supporting paperwork is included.

A caseworker then carries out an initial review so that advice and information can be given to the applicant immediately. If it is clear that the help requested isn't something we can assist with then the applicant and branch welfare officer will be notified without delay. This all takes place within 1 working day and at this stage applications are prioritised:

Priority 1 cases are considered emergency situations requiring immediate attention. Assessment starts within 1 working day.

Priority 2 are those cases considered urgent but not an emergency. Assessment starts within 5 working days.

Priority 3 are all other cases and assessment usually starts within 3 working weeks (for various reasons this is not always be possible).

STAGE 2: Application is assessed

During Stage 2, the caseworker may contact the applicant or branch welfare officer for further information to help complete our assessment.

Often this information can be obtained during the course of a telephone conversation however, if further paperwork is required, the case will be put 'on hold' and will not progress to Stage 3 until this is received and the assessment can be completed. Applicants and branch welfare officers should check their 'junk' email folders regularly as requests for additional information may be sent by email.

STAGE 3: Decision & outcome

When Stage 2 is completed, the application will move to Stage 3.

A letter or email detailing the decision along with information regarding payment of any award as well as other relevant advice will be sent to the applicant and copied to the branch welfare officer.

How applications are assessed and frequently asked questions

Our assessment process is designed to ensure that all applications are looked at consistently with a particular focus on how well the applicant meets the eligibility criteria.

Six important assessments are made on every application as described below. Use these as a checklist when:

- a) Considering whether a member should apply for financial assistance;
- b) Checking that the application form has been completed in full. NOTE: An application that addresses much of the 6 six assessment points is likely to get a quicker decision.]

1. Is the request something we can help with?

We'll look to see what the unexpected need is and where we can be of most help. If it's not something we can help with then we will tell the member as soon as possible but also look at other ways of helping for example signposting for suitable advice.

2. What is the financial position of the individual or household?

We will look at all household income and essential outgoings and, what is considered to be reasonable expenditure on living costs. Note: A shortfall between income and expenditure doesn't automatically qualify someone for financial assistance. Advice on budgeting and reducing non-essential expenditure may be offered especially where it is felt that this would enable the applicant to deal with their financial difficulties.

3. Their personal circumstances e.g. health, domestic, work etc

Here we will consider whether there are other factors that should be taken into consideration for example, has there been a recent relationship breakdown or change in employment terms and conditions that have contributed to the financial difficulties.

4. What has the applicant done, or tried to do, to improve matters?

For example where debt or arrears on debt payments is an issue, has the applicant taken advice or, tried to reach an arrangement to clear any arrears, before requesting financial assistance. Or, where finances are under pressure, have they already looked at ways of minimising their non-essential expenditure.

5. What are the consequences for those involved?

Here we'll consider what might be the impact if we were unable to advise or assist.

6: Is this a short or long-term problem?

This may influence the package of help that may be agreed. There for You should only be seen as a short-term safety net as we cannot provide long-term or ongoing financial support. Where financial difficulties have been long-standing and unconnected with a recent unforeseen event then it's more likely that the applicant will be referred for expert advice initially such as budgeting and/or debt advice.

What will delay the assessment of an application?

If any paperwork is missing then no assessment will be undertaken until this is received. There are also times when it is not apparent that supporting paperwork is missing until the assessment is being carried out. If this happens, the caseworker will contact the applicant to let them know what is needed and in most cases give a two week deadline to submit the outstanding information. If this is not received by the deadline, then the application will be closed (exceptions are made in particularly stressful situations and/or where the applicant is considered vulnerable). This doesn't

prevent anyone submitting a new application – up-to-date information and supporting paperwork will be needed, however, as the request will be treated as a brand new application.

How long does it take for an application to be assessed?

A complete application can usually be decided within 4 weeks. While there may be delays at particularly busy times of the year, the most urgent Priority 1 cases are generally decided much quicker.

If an application falls outside the criteria, the branch will be notified as soon as possible. In exceptional circumstances, the request may be referred to the charity's Board of Trustees for further consideration.

NOTE: A complete application is one that has been accurately filled in and all documents required – including those asked for after receiving the form – have been submitted.

Once an application is in the 'system' under what circumstances should I contact There for You?

If the applicant tells you that their circumstances have changed or worsened, let us know immediately as this will ensure our assessment is based on the most up to date information. Depending on what we are told, it also gives the caseworker the opportunity to consider whether the case should be re-prioritised.

Decision and outcome

What financial help can a member expect to receive?

There is no automatic entitlement to financial assistance and all help is discretionary. Our assistance is needs-related and assessed on an individual basis. As a result, we are unable to give a clear indication of the likely amount of help until an application is submitted and the assessment process completed. There is no guarantee that help will be agreed in every case and some applications are unsuccessful.

Where help is agreed, it is usually non-repayable. However, financial limits are set for different grant categories and this means that in many instances, we can only make a contribution towards any specific 'need' that the member has.

Will length of membership influence the outcome of an application?

Yes, where someone hasn't been a member for very long this will affect how much they might receive. New members [in the first four weeks of membership] are eligible to receive advice only. From 4 weeks up to 1 year financial assistance is available at a reduced amount. Members are responsible for ensuring they pay their subscriptions at the correct rate and their membership record is up to date. If there is any concern about this, the member will need to contact UNISONdirect in the first instance to get it updated.

One of my cases has been referred to the Board of Trustees – why is this?

It could be the member has made multiple applications and/or already received what the Board considers a significant amount.

Rules around membership

To access the range of benefits individuals are responsible for ensuring they pay their membership subscriptions at the correct rate and that they are not in arrears. Members should contact UNISONdirect or speak to the branch if there are any concerns about this.

Are documents returned to the applicant?

Posted documents can be returned to member if requested but a copy may be kept with their case.

How do I get to know the outcome of an application?

Whatever the outcome, you and the member will be notified either by email, post or telephone.

What should I do if a member is dissatisfied with the outcome of their application?

There is no appeal process however you can request a review of an application if you feel there is additional information that has not been taken into account. Not liking the outcome isn't grounds for review.

If a member is unhappy with the way their application has been dealt with or the service received there is a complaints procedure contact thereforyou@unison.co.uk for further information.

Other frequently asked questions

My member was struggling before they joined UNISON. Will this be a factor when assessing their application?

The charity is unable to offer financial assistance with debts or costs associated with events prior to membership, although advice will be given including details of any alternative charities that may be able to consider help with earlier issues.

How do the regulators define financial hardship?

Although you have to be in financial need (hardship) to be considered for help, this does not mean you have to be destitute. There for You follows the guidelines of the Charity Commission (England & Wales) and the Office of the Scottish Regulator which state that you are in financial need if you do not have 'access to the normal things of life that most people take for granted' such as housing, heating, food and clothing.

Can applicants request help for something they've previously received a grant for?

Most grants are one-off. Generally speaking there would have to be exceptional circumstances for the same help to be repeated.

Can I contact There for You to discuss a case before completing an application?

Yes absolutely. In fact we'd prefer if you did that especially if you're unsure about anything. Our support team can help with general queries or if you're uncertain about how to advise a member or whether to initially signpost them to another organisation then ask to speak to a caseworker.

Is debt a significant issue?

Unfortunately yes. We know that there are many members who are struggling with debt and borrowing. Promoting UNISON Debtline is a vital part of your role. Once members know that the service exists, they can make direct contact without having to come to you first.

What is a priority debt?

Priority debts are things like council tax, gas or electricity, mortgage, rent, TV licence, maintenance or income tax arrears. These are considered priority debts because failure to pay them could lead to the loss of goods or services. In some cases, non-payment of priority debts can also lead to imprisonment.

What are non-priority debts?

Not paying non-priority debts is usually less serious than not paying a priority debt however creditors can still take legal action which could result in a county

court judgment. Non-priority debts include credit card debts, catalogue or store cards.

Is fraud ever an issue?

Applicants are required to sign a declaration that the information supplied on the form is true and complete. Anyone giving a false or partial picture of their circumstances in order to get assistance may be subject to the union's disciplinary procedures. A false picture would be for example failing to declare a partner with an income, or that there is other income or savings to live on than those declared on the application. It is also fraudulent to accept a payment from the charity if circumstances have changed to the extent that hardship is no longer an issue.

I've been told that when a member makes an enquiry I should send them a financial assistance form straight away. Is this correct?

We wouldn't recommend it as this may give the impression that they are eligible for financial help and so would always prefer you to have a conversation first. This will give you a good understanding of the issues and whether referral or signposting elsewhere is the first step in managing the enquiry prior to requesting financial help.

I called to check the progress of an application – why won't you discuss this with me?

It's possible that the applicant sent the form in without your endorsement. If that's the case, then for reasons connected with data protection we cannot discuss the case with you other than if the applicant gives their permission.

Are there any circumstances where assistance can be given without the need to complete an application form?

Yes. In entirely unusual and traumatic circumstances we can on occasion help without the need for an application form to be completed. Contact the Casework Manager or Head of There for You if you think this applies to one of your members.

Can members apply for help without going through the branch welfare officer?

Yes. For example some members prefer the anonymity of applying direct; maybe they're already being helped by another organisation e.g. Citizens Advice or perhaps due to work location/shift pattern it's difficult to make contact with the branch welfare officer. We always encourage contact with the branch as we know how invaluable local support can be.

CHECKLIST

Pre-Application



- ☐ Have you checked that the applicant is eligible to apply? If the applicant is a member, their subscriptions will need to be up to date and, as a minimum, have paid 4 weeks membership.
- ☐ Are there alternative sources of help that the member should be looking into before submitting their application?
- ☐ Familiarise yourself and feel confident with filling in the form before you start to help anyone else. Make sure you know the relevance of questions as you may be asked about this.

CHECKLIST

Complete



- ☐ Use the appropriate form for the request being made.
- ☐ The form is completed properly and all relevant sections and information is given as fully as possible.
- ☐ Refer to the pre-application checklist for guidance on other information that may be useful to include.
- ☐ Application form has been signed and dated. Applicants must sign their own forms. Unsigned forms will be returned.
- ☐ You have included applicant's situation and any other information that you know of that is relevant to their request.

CHECKLIST

Clear



- ☐ The information given in the form is clear and fully explains the member's situation.
- ☐ Handwriting is as legible as possible.
- ☐ The most important issues affecting the member are clearly explained.

CHECKLIST

Compatible (with the criteria)



- ☐ The applicant's circumstances and their reasons for seeking financial assistance are unforeseen.
- ☐ The help asked for is something we can consider (check latest criteria).
- ☐ Any exceptional circumstances are clearly explained.

CHECKLIST

Close



- ☐ Complete the relevant paperwork and **delete** your copy of the application form as soon as you receive notification that the case has been decided.
- ☐ Check-in with the member that they have received the decision letter. If advice has been given check they are clear about what they need to do and, where appropriate offer support.

SECTION 10:

CASE STUDIES

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The following case studies are provided as examples of some possible ways There for You can be of help and the type of enquiries you may receive. These fictional cases do not cover every problem or solution, but are intended as useful illustrations of our work.

Remember if you are ever unsure then contact staff at There for You on 020 7121 5620 or email thereforyou@unison.co.uk

1. Unsure how to help



A steward has asked you to meet Cathy who was recruited into the union just 5 days ago on the back of a dispute over non-payment of wages. Cathy tells you that although she's been told she'll receive her arrears of pay within the fortnight, there's already no money in her bank account and her rent is due on Monday.

UNISON has specific rules regarding length of membership and access to benefits. In this case, although we couldn't help with a grant, the welfare officer can always contact staff at There for You for advice on other ways of supporting Cathy which might include communicating with the landlord and any other creditors.



[Download information about how branch welfare officers can register with their local food bank](#)

Also, exploring whether there is any Local Welfare Assistance Scheme operating in the area where Cathy lives. Branch welfare officers can also register with their local foodbank so that referrals for emergency food and fuel can be obtained (guidance on how to do this is available to download or email thereforyou@unison.co.uk)

[Note: Members are responsible for ensuring their subscriptions are up to date and that they pay the correct subscription rate.]

2. Help in a crisis



Janice's partner left her a couple of days ago and she has just discovered that their joint bank account has been emptied. You know that payday was only two days ago and Janice is in a terrible state. Her main concern is that she doesn't have a penny to pay for her travel to work and has little in the way of food. She has no family and doesn't know what to do.

You need to reassure Janice, that There for You is here to help that you will contact us, and that the financial assistance application form will need completing.

Suggesting to Janice that she contact her bank immediately to let them know what has happened will be important as well as letting the police know.

The best option is for Janice to open a new account before next payday; however this is something she should discuss with her bank.

3. Complex debt problem



Jack contacted you by phone and has debts and no way of repaying them. His mortgage arrears are £5,000 and mounting. He has just lost his job as a result of redundancy. He is looking for financial assistance. When you met Jack it turns out that he is paying three different loans back at high interest rates.

One option might be restructuring his debt but this is where Jack needs expert advice.

This kind of case necessitates making appropriate referrals so that Jack can deal with the financial crisis facing him and then be helped to manage his money matters for the future.

We have a long established relationship with Payplan who provide confidential debt advice to members and their dependants under the UNISON Debtline brand. They will be able to provide Jack with all the support and information he needs to deal with this crisis.

There may also be financial short-term help that There for You could provide to give him some income whilst he claims the relevant benefits. If there were critical debts such as fuel which need to be paid urgently we may be able to help there too. Contact: **UNISON Debtline**
0800 389 3302

4. Unclaimed benefits



Doris is a retired member. She has been living on a tiny income but now is finding it hard to afford to heat her home.

If her bills seem unusually high it may be worth contacting her fuel supplier to check that her meters are working properly or find out what energy efficiency schemes operate whether nationally or locally. Information about these schemes should be available on your local authority's website.

Alternatively, check There for You web pages where you will find lots of information about what's available. Doris should also receive a winter fuel payment from the government so check that this is being paid.

Of course financial assistance towards Doris' heating costs may be something we can help with so filling in an application form is another way of supporting Doris.



Branch welfare officers should refer to 'Help with Fuel Costs' guide

5. Reduction in income



Frank was employed as a nurse but is now unable to continue working due to a disability. His income is reduced substantially. He used to be in the army.

Frank may be eligible for help from one of the armed forces charities or other professional charities. Checking that he is claiming all the state benefits to which he is entitled is helpful.

There for You can help with financial problems where specific items are needed.

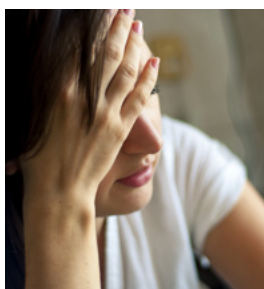
For instance Frank may need special transport such as a wheelchair or adaptations to his house. The local authority should be approached first for assessment for a Disabled Facilities Grant but an application for assistance could be made if there was no funding available or a shortfall in the funds required. We would also approach other charities so that any financial support could be shared between those charities to which Frank is eligible to apply for help.



Refer member to our Benefits Checker

Also: www.gov.uk/disabled-facilities-grants

6. Health & wellbeing



Moirra is a Police Support Worker and currently not working following a major crime incident she was involved in which has left her suffering the effects of post-traumatic stress disorder. She has both a partner who is a restaurant manager and a young child. The last three months she's been off work and things have been pretty tough for everyone. Moirra is particularly worried because her partner has already lost earnings through taking care of their daughter and she's scared his job might be under threat.

She's also paying out a lot on prescriptions at the minute.

We need to check that Moirra is being helped in claiming any benefits she may be entitled to. Depending on what we find out, help with childcare, prescription costs, and a wellbeing break are all possible options that we could help with. As her partner works in the hospitality sector, a referral to Hospitality Action an occupational grant giving charity similar to There for You is also a possibility.



Refer member to our Benefits Checker or get help from Citizens Advice Bureau.

7. Managing expectations



John has savings but wants assistance after his divorce to set up a new home. He also has a legal bill that is more than he expected. The branch welfare officer advised that his savings of £9,000 would mean this would not be possible but John insisted on making an application. John thinks he should be entitled to help after paying his union subscriptions for all these years. He is well known in the branch and is therefore quite influential.

The branch welfare officer knows that John will be annoyed at the outcome so does not return his calls. Two months later John puts in an official complaint about the service he has received, copied to the General Secretary.

You need to say as early as possible if you think a member's request does not

meet the criteria for financial assistance and the application form asks key questions on finances for this reason. Also, the staff team working at There for You will always speak to a member if you are having problems. Alternatively, you can put your query about the criteria in writing to the casework team (email thereforyou@unison.co.uk) in order to get a clear answer. This way John would see that it is the rules of the charity, not your obstruction, which invalidates his request.

In this instance, it would be impossible to support a request for financial assistance to help set up in a new home where a member has savings of £9,000. Furthermore, the charity cannot help with legal costs under any circumstances.

8. Saying “No”



Paula's husband died suddenly. She made an application to There for You for help with funeral expenses but in the meantime borrowed the money from family members.

Unfortunately, we do not repay debts such as this. The fact that she could raise the money from family means that the finances were available. When someone makes an application we always need to explain to them that processing it will take a bit of time. In distressing situations, people can panic and then effectively prohibit themselves from receiving assistance.

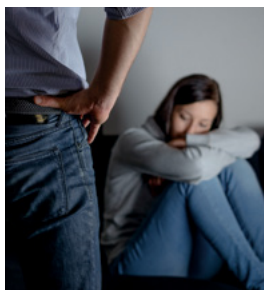
In funeral expenses cases, although we appreciate that this is a distressing time,

the caseworkers will first need to clarify whether or not the person who has died has left any estate, whether there is any entitlement to a death in service payment or life insurance and they will also give advice about any benefit assistance that can be claimed. Where the deceased is the UNISON member, if they were still working at the time of their death then it's worth making an application to UNISON Rulebook benefits as a death grant may be payable.

Branch welfare officers should refer to '[Guide on Arranging an Affordable and Meaningful Funeral](#)'

for detailed information on help that is available both from There for You, statutory help and other assistance.

9. Domestic abuse



Sarah is suffering stress at work but it turns out she is a victim of domestic violence but has told no-one. She has three children and is pregnant and is not sure that she wants to leave her partner permanently.

In this kind of case, it is useful to work in tandem with a specialist domestic violence agency such as National Domestic Violence Helpline. A refuge may be an appropriate place where she can have the space to enable her to come to a decision about her future.

Skilled staff can also help her explore the option of family counselling.

The charity can give travel expenses if Sarah had extra costs for getting her children to school. She would need to explore what other grants were available but in the short-term we may also be able to help with food and clothing grants. In certain cases we may be able to give financial help towards setting Sarah and the children up in a new home if remaining in the family home is not possible.



Branch welfare officers should refer to our 'Directory of Useful Organisations' for information on national agencies that support victims of domestic abuse

10. Publicising the service



Lindsay was the branch welfare officer. She found that very few members were coming to her for help and information.

She raised this at a branch meeting and it was agreed that all stewards would be asked to help in putting up posters on all workplace noticeboards all over the local authority where she worked. Lindsay also made an appointment with a personnel officer and told her all about the work she did. As a UNISON member, the personnel officer was delighted to hear about

There for You and helped Lindsay get referrals by regularly featuring news about There for You in the weekly staff e:newsletter. Lindsay then talked to the Women's Officer in the branch as she knew there were a lot of women low paid members employed by the local authority. Together they did joint presentations to members outlining the kinds of assistance that was available through UNISON and There for You. The numbers of women members coming for assistance increased immediately.

11. Working with local agencies



Sasha is a young member and has recently moved into her very first rented home. Her problem is that she has had no heat or hot water for the last 6 weeks as the boiler keeps 'cutting out'. She's spoken to her landlord four times already about getting this fixed and he has told her that she'll have to pay half the repair cost. The branch welfare officer has been asked if There for You can help with a grant. Sasha doesn't want to fall out with her landlord.

Repairs such as these are the landlord's responsibility and so a grant from There for You would not be a consideration. Sasha needs to

be supported with obtaining advice from an organisation such as Citizens Advice or Shelter. They may even contact the landlord to remind him of his legal obligations.

Supplementing information that is received from There for You with knowledge of other organisations that can help is an important part of the branch welfare officer's role. Many enquiries will never become an application for financial assistance; however the support branch welfare officers can give by listening and guiding members through their options is a vital part of the charity's service offering.

12. Going away and leaving no one in charge



Peter would have been entitled to help in the situation that he faced. He had no savings and had a flood in his house. He also had little in the way of money in his bank account. He needed help with provisions for his young baby daughter.

Peter tried to contact the branch welfare officer who was on holiday for three weeks in Florida. On returning, she found a number of messages on her mobile from Peter telling her that he had been forced to move into temporary hotel accommodation because of the lack of adequate facilities for looking after the children in his damaged home. Although the

insurers were meeting the hotel costs, it had still been a struggle and in those first few days a small amount of help would have made a huge difference.

Make sure you have arrangements in place for when you go away. It's perfectly fine to refer members to There for You. What's most important is that members know who to contact. If the branch welfare officer had changed the recorded message on her mobile and, ensured the branch knew what arrangements were needed in her absence, Peter would have been left with a very different impression of the service.

SECTION 11:

PUBLICITY &

FUNDRAISING

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 - The importance of publicity
 - Promoting the service
 - Recruitment and our USP (Unique Selling Point)
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This section is intended to help you to start publicising your new role and publicising the There for You services amongst your colleagues. There are checklists at the end to help you get started in spreading the word and raising money for the charity.

Publicity and fundraising

When writing these guidelines and deciding the order of content there was some debate about whether 'publicity' should come first. That's because so often when asked what's the most important activity that anyone in the branch can do for There for You, we'll say ... publicity, publicity, publicity.

Essentially, in order for There for You to function well and provide assistance and help to members, the membership must know about it – if they don't know about us then no-one will look to you for help! You are an ambassador for the charity. This is a major part of your role and will increasingly be so. No other union has a charity like ours. There for You is unique.

The importance of publicity

In one of our largest ever surveys, it was revealed that up to 30% of UNISON members are not even aware that the union has its own charity. That is nearly 390,000 members.

It is vital that we keep our activists (they may be one of your main sources of referral given their involvement in work-related casework which will often be linked to personal issues outside of work) and members informed of the range of services we provide and the help that is available to them. You also need to think about how you can engage with retired members and, members who relate to the different self-organised groups.

TIP



Members will only seek our help if we publicise the service. Members who are most in need of our services will have found themselves in a sudden and unexpected crisis, so it is important to constantly remind members about There for You so that they know and remember we are there for them when they need us.

Promoting the service

First and foremost your role is to make members aware that they have access to UNISON's unique charity.

If members don't know about the service then why would they even contact you?

Once colleagues in the branch know who you are, you need to start reaching out direct to members. This means clearly explaining the help that is available.

There are always publicity materials available including posters and leaflets that you can use to advertise the service. These materials will get the key ideas across and will give the necessary information to members in need of assistance. We've also helped by producing a power point presentation along with speakers' notes that you can use. In this way you are helping to create a positive image of There for You by promoting the service wherever possible and developing the work of the charity within the branch.

Recruitment and our Unique Selling Point (USP)

It is also important to publicise There for You, as it is a great way of attracting new members to UNISON. We are unique among trade unions in having an in-house charity to provide welfare services and, in a crowded field of different trade unions, it is important to emphasise this unique selling point.

One conclusion from a major survey undertaken by UNISON was that our unique status as an in-house charity should be used to recruit new members.

TIP

No other trade union offers a service on a scale such as ours.
No other trade union has an entire charitable organisation attached to the union to provide a safety net for our members.



We need to tell as many members and as many potential recruits as possible about our charity and the wonderful services we provide.

Working with your employer

There is also potential for building relationships with employers by emphasising the benefits of our services to them and their employees. Once they understand how useful your services can be in assisting members and their dependants, they may be keen to support your work and encourage referrals to you. Often employers are the first to recognise the additional benefit to the wellbeing of their workforce of having an effective branch welfare officer in their organisation. This may also help to secure appropriate facility time in due course. We look further at the issue of facility time in Section 5.

How to get email bulletins

You need to be registered on RMS/WARMS as the branch welfare officer to receive our email bulletins covering topics such as: small grants programmes, upcoming training events, new materials or fundraising campaigns, seminars and the Annual General Meeting etc.

Materials

There for You produces a wide range of communications materials:

- [Visit our pages on the UNISON website to view our publicity materials.](#)
- You can download and print most materials including application forms.
- [Your branch can order stock items using the UNISON online catalogue.](#)
- You can keep up to date with what's available and how to obtain the material via the website.
- Your branch publicity officer might be able to help you to order the materials necessary.

Publicity techniques

Part of what makes a good branch welfare officer is being a good self-publicist. You should always try to be active when it comes to raising the profile of There for You and the great work that you do for us.

Social media

Using social media offers a more interactive relationship with members than only putting information on a website. Your branch's existing Facebook and Twitter accounts are a great way to share information about There for You since members may already be following them. Use social media to share news, give advance notice of events and inform members of upcoming application deadlines. If you can include a relevant photo with your post, this really helps people to engage with what you're saying. Facebook allows you more space to give detail (so don't forget you can always tweet a link to Facebook), while Twitter is a great way to tap into topical conversations. Have a look at what's trending on Twitter and join in with current conversations, for example #UniversalCredit or #CharityTuesday. Or on other social media sites such as; Instagram, Threads and TikTok.

Making reports about your work

All welfare officers are members of the branch committee and play an important role in the effective functioning of the branch. You should always try to attend branch meetings so that welfare issues are properly considered when the branch is developing plans and strategies. As a branch welfare officer you are accountable to the committee and should make regular reports about your work. You should keep your branch committee and reps up to date with any developments that are relevant to There for You.

In your reports you should tell the branch about:

- National developments and our achievements nationwide.
- The work you've undertaken e.g. how many members have contacted you, how many have applied for financial assistance and outcomes. (see form at [Section 6](#) – Welfare activity in branch)
- Upcoming events and fundraising initiatives including asking for their support.
- [Remember: whilst case examples are useful for illustrating how you have helped, no personal information can be given. A general overview is always helpful for others to understand our work. See also [Section 7](#)].

Fundraising

As a charity our income is very dependent on the support we receive from individual members and branches and fundraising is now an important activity for us.

Although we receive money from UNISON, this does not cover all our costs and if we are to continue what we're doing, find ways of extending our services, and grow as an organisation then we must raise more money.

So, whilst we do not expect branch welfare officers to be fundraisers on top of their many other responsibilities we do need your support in ensuring the branch and members are actively encouraged to consider different ways of donating.

To help get you started, at the end of this section we've included a checklist of simple activities that we ask all branch welfare officers to carry out.

DON'T KEEP YOUR NEW ROLE A SECRET FROM COLLEAGUES! DO:

- ✓ Brief your branch committee and reps about There for You and get yourself known to them.
- ✓ Order our materials to distribute to members. Reps might be able to help with this as well.
- ✓ Keep reps informed so they can signpost members to you and promote initiatives such as winter fuel grants and school uniform grants as well as the support the charity can provide to members at particular times of stress. This is especially important as branch reps will be one of your most important channels for reaching members.
- ✓ Put posters up on noticeboards in and around the workplace and keep this up to date with information on There for You.
- ✓ Set up a stall at recruitment days.
- ✓ Use email and social media to send out notices and information.
- ✓ Write a regular article for your branch or staff newsletter, if you have one. If you are stuck for ideas on what to write about, contact the staff team in London.
- ✓ Volunteer to talk to relevant workplace groups or colleagues on committees about your work.
- ✓ Arrange to give a presentation on There for You to your employer or human resources department.
- ✓ Try to get your employer involved – for example:
 - You might be able to get a message about There for You on your employer's wage slips.
 - You might be able to become a part of the staff induction process e.g. give a short presentation at staff inductions or be mentioned in an induction pack.
 - You could also contact HR or Occupational Health department and let them know about There for You so that they can refer employees to you.

The best publicity, however, will be word of mouth recommendations from members that you have actually helped. Once members have used your advice and assistance you will find that word rapidly spreads about the value of our services. Little things like getting back to people promptly, and remembering personal details are important in maintaining a positive image of There for You, and the great service you provide.

UNISON Lottery

Why play the UNISON Lottery?

Every year There for You pays over £1million in grants and support to UNISON members. And, whilst UNISON pays for all our staffing costs and gives the charity a grant each year, more than half our income comes from other fundraising initiatives. So the UNISON Lottery is a valuable way of raising income for the charity and at the same time players are in with a chance of winning great cash prizes each month.

Can branches join the lottery?

Yes, absolutely! Imagine this if every branch signed up for 20 numbers a month which is equivalent to £20, this would raise more than £100,000 a year for the charity and would have a huge impact on what the charity was able to do to help members.

Here are some examples of what branches have done with their winnings:

- Branch A – used their winnings to help fund organising and recruitment activities.
- Branch B – always donate their winnings back to There for You.

- Branch C – put their winnings towards purchasing branch promotional items.
- Branch D – don't have a huge amount of money in reserve so any winnings go into a float for their branch welfare officer to purchase small gifts for members who may be seriously ill or on long-term sick.

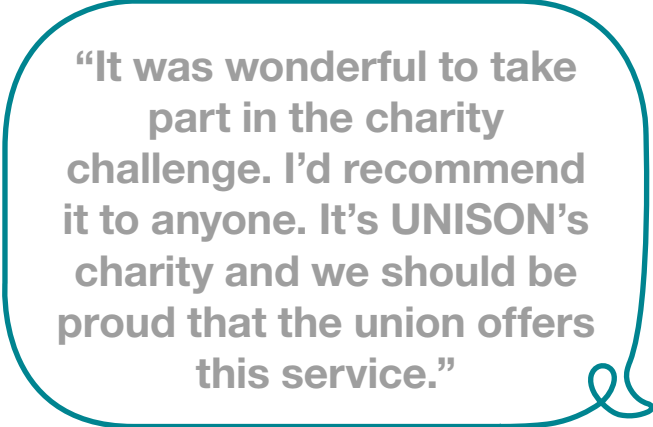
What about members – can they play?

Yes, members and indeed anyone can play the UNISON lottery. There is £10 monthly limit for individual players.

So please ask your branch to join and promote the lottery to colleagues by putting up posters on all your noticeboards. For further information visit www.unison.charitylotteries.co.uk

Regular donation

Of course your branch may prefer to make a regular donation to There for You rather than join the lottery. In which case setting up a standing order or direct debit payment is very straightforward. Just email thereforyou@unison.co.uk and we'll send you all the details you need.



“It was wonderful to take part in the charity challenge. I’d recommend it to anyone. It’s UNISON’s charity and we should be proud that the union offers this service.”

Charity challenge events

Charity challenges are another way that the national team looks to raise money. They are a great way of wooing some members who like the challenge of taking part in a walk, climb, cycle ride, or indeed some other type of event.

We also know from experience that the intensity of the ‘adventure’ challenge event with its sense of shared achievement and real hardships overcome, often translates into long-term support by those who have taken part.

Branch welfare officers are often the first people to be told about such events and your role is to ensure that information is shared widely within the branch so that we get as many people as possible interested in taking part.

Local Fundraising

Depending on the size of your branch or what’s going on at any time, local fundraising may be something you can consider. Whether it’s a quiz night, raffles or tombolas, murder mysteries, sponsored slimathon etc, fundraising’s always more fun as a group.

Resources

[A-Z of fundraising ideas](#)
[Raffle guidelines](#)

CHECKLIST

Publicity



- ☐ Have you informed the regional welfare lead about your appointment?
- ☐ Have you had your details entered onto the WARMS/RMS?
- ☐ Have you downloaded any materials you need including application forms?
(Make sure you keep all your information up to date by reviewing quarterly visit www.unison.org.uk/thereforyou)
- ☐ Have you told members about your new role?
- ☐ Have you put an article in the branch newsletter and your employer's staff magazine or newsletter?
- ☐ Have you ordered some of our publicity materials?
- ☐ Have you made contact with your branch committee and reps and let them know when and where they can contact or find you?
- ☐ Have you put up some posters?
- ☐ Have you tried to get your employer involved e.g. at staff inductions or with your HR department?
- ☐ Are you making regular reports to your branch committee?
- ☐ Are you using There for You as an incentive to recruit new members?
- ☐ Have you decided how you will keep There for You in the forefront of members' minds?

CHECKLIST

Fundraising



- ☐ Ask the branch to support us with a regular donation.
- ☐ Ask the branch to support the UNISON Lottery, which raises money exclusively for our charity.
- ☐ Promote regular giving and joining the UNISON Lottery to branch members. There are a range of resources including posters that will help you with this.
- ☐ Ask people in your branch to join our charity challenge events.
- ☐ Tell your work colleagues and family about these events so they can join in or sponsor a participant.
- ☐ Involve the branch and members in local fundraising for example, raffles, quiz nights etc. Contact thereforyou@unison.co.uk for more ideas on ways of raising money or visit www.unison.org.uk/thereforyou.

there
for you supporting UNISON members
when life gets tough

Tel: 020 7121 5620

Email: thereforyou@unison.co.uk

There for you is the working
name of **UNISON Welfare**

Registered Charity No. 1023552
in England and Wales and
in Scotland No. 38305

The logo graphic for UNISON, featuring three stylized, overlapping wavy lines in orange and yellow that sweep upwards and to the right, partially framing the text.
UNISON
the public service union