

# Developing and supporting activists

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A guide to branches

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Revised September 2014



## Message from the General Secretary

Developing and supporting activists is a crucial role for all UNISON branches – it is also crucial to building our union.

With all the other pressures on UNISON members and reps, it is hard for reps to attend a training course and then find the time, or the opportunity, to put their training into practice.

In the current climate our activists are more important than ever, so UNISON has developed straightforward resources and training to encourage reps to get active and to help branches work effectively with reps. This revised guide sets out some options for how you can most effectively support reps in your branch, in line with our key message to activists:

- UNISON values the contribution of every workplace representative. UNISON is committed to providing development opportunities to enable you to fulfil your role effectively, including providing you with a named contact who can point you in the right direction to help you in your role. These opportunities are designed to benefit you as an individual and as part of a collective organisation.
- UNISON asks reps to be proactive in finding opportunities to put into practice new skills introduced on training courses and in line with your union role. This means following up on agreed actions, and seeking out information and support to enable you to carry out your role effectively.

Our objective is to ensure that we have reps who are trained and active across every workplace where there are UNISON members. We hope this revised guide, along with Utrain, your regional education programme, and the support and enthusiasm of organisers in your region will help us achieve that goal.



Dave Prentis

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## **Acknowledgements**

Thanks to all the branch secretaries and branch education co-ordinators who have provided information about their experiences of setting up buddying and mentoring schemes in UNISON branches at National Delegate Conference 2013.

## Why is it important to develop and support activists?

UNISON reps are crucial to the effectiveness of UNISON. UNISON is absolutely committed to supporting reps through the provision of first class training and resources. The next step is for branches to encourage both new and existing reps to:

- take full advantage of these training opportunities
- make it as easy as possible to put what they learn into practice.

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### **Challenges for public services**

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Public service workers are facing difficult challenges. UNISON needs to be organised and prepared to defend members' interests, and to promote the value of public services and the work our members do. This means making the most of the stewards, health and safety, learning and equality reps we already have, and showing to potential reps and members that UNISON really does value workplace reps.

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### **Our reps make the difference!**

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Members and potential members say that where there is a respected and active UNISON representative in a workplace, it makes them more likely to join UNISON and stay involved in the union.

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### **Promote organising in branches**

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The most effective way to encourage organising in branches is through direct support to reps from branch secretaries and stewards. Organising in UNISON means encouraging members to get involved around issues and recruiting and involving members in a systematic way. Where workplace reps use organising techniques such as branch mapping, branches are much more likely to grow.

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## Help with case work

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Many branches who have tried out mentoring and buddying schemes have found that it had a positive impact on case work, by involving more workplace reps in supporting members in grievance and disciplinary cases. This spreads the load and develops expertise and confidence in UNISON reps.

*“As a consequence of this system we have a number of reps who are now successfully running with cases from start to finish.”*

*Branch Secretary*

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## Workplace reps are often isolated

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Reps are often isolated, either because they are the only UNISON rep in a workplace or because the workplace itself is cut off from the rest of the branch – in a care home, a school, a small voluntary organisation or a doctor’s surgery for example. Not surprisingly, it is easy for isolated reps to become burnt out or disillusioned.

UNISON absolutely relies on volunteers such as these – branches owe it to them to offer as much practical support as possible!

*“The key is to keep in regular contact with all our activists and check how they’re getting on.”* Branch Secretary

## Identifying potential activists... and talent spotting

As well as recruitment, every branch should have a strategy for getting new activists – contacts and reps.

Try to use every opportunity when engaging with members to spot potential activists...and then follow them up!

Potential activists could be:

- recommended by workmates
- involved in the community
- already speaking out about an issue
- respected by other workers
- asking questions or contacted the union about a workplace issue

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### Getting active

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Identify practical tasks a potential activist can get involved in and ask for their help. Keep track of what you've asked them to do, note progress and check back with them how they got on. Remember also that many activists will be happy with their current level of involvement.

These are the principles of UNISON's Trained and Active approach to developing and supporting reps. This guide has suggestions for structured approaches to keeping in contact and building the confidence and activity of contacts and reps.

# Developing and supporting reps at every stage



## Key steps to get branches started

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### Branch education co-ordinator

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The role of branch education co-ordinator is a crucial one. If there isn't one in your branch, encouraging someone to take on this role is an essential first step. The branch education co-ordinator will help to support and develop reps, for example by:

- making sure all new reps receive information about the branch and their role
- publicising the range of educational and training opportunities available to members and activists, and making sure that all reps go on appropriate training courses
- negotiating with the employer, along with union learning reps, on issues relating to learning including time off
- talking to existing reps about their ongoing training and development needs
- supporting and co-ordinating the work of buddies and mentors in the branch

### **Keeping track**

- Keep a training record of all workplace representatives, including stewards, contacts, health and safety, learning and equality reps.
- It's important so that reps can be encouraged to attend appropriate training, and to ensure that stewards have the necessary Employment Rights Act (ERA) accreditation.
- Keeping confidential records of completed Trained and Active Planning (TAP) forms, and sometimes working through the TAP form with new reps

### **Support for new reps**

- Make sure that each new rep has a 'named contact', a buddy or mentor who will have a chat with them regularly, to find out what training and support they may need, and to catch up on how their role is progressing.

### **Regular catch ups with existing reps**

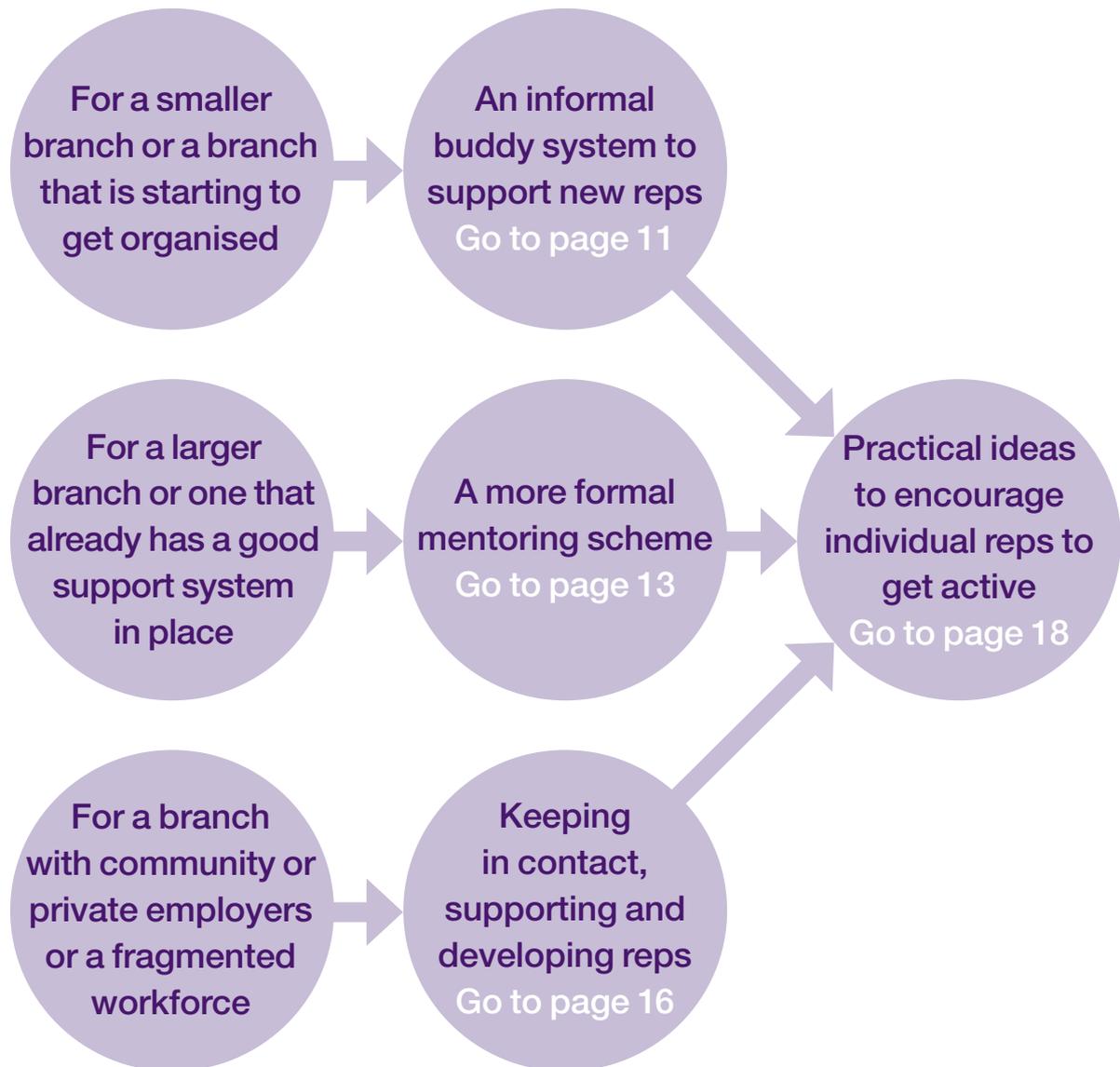
- Arrange for regular catch ups with existing workplace reps over a period of time, especially where they have not been active in the past or have recently completed training courses.
- Aim to ensure that all reps have the opportunity for a twice yearly catch up with a named contact, which could be the branch education co-ordinator or a trained mentor.

### **Joint branch and regional assessment**

- Work with your regional organiser to complete your annual assessment and branch plans. Put steps in place to carry out the follow up activity. This will address some of the key building blocks to supporting and developing activists.

## A named contact, buddy or mentor?

Different branches will have different approaches to this.  
Here are some ways it could work:



# An informal buddy system

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## What is a buddy?

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A buddy could be any existing rep or branch officer who has completed the appropriate training and who is experienced, e.g. in casework, representation and recruitment. For new health and safety, learning and equality reps the buddy could be a more experienced rep in the same role, or the relevant branch officer.

### What can a buddy do?

- Work with the new rep to fill in the Trained and Active planning form (the TAP form) and keep in close contact with the branch education co-ordinator
- Go with the rep to branch committee meetings and make sure they meet branch officers and other reps
- Arrange briefings on employer policies and procedures
- Signpost the new rep to the relevant branch officer to help with specific issues
- Organise ‘shadowing’ opportunities
- Offer a listening ear and help point the new rep in the right direction
- Get the new rep involved with practical tasks and activity

*“The main reason for the buddy system was to ensure that new stewards felt supported whilst learning how to do sick reviews building up to grievances and disciplinary” (Branch education co-ordinator, health branch)*

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## For how long should you ‘buddy’ a new rep?

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There is not a fixed time scale for the period in which a buddy will be supporting a new rep – it will depend on experience, knowledge and confidence of the new rep.

- It is especially important for the buddy to catch up with the new rep regularly as they begin their role and after training, to assist the new rep with follow up actions
- Any buddying agreement should have an agreed end date, which should be reviewed and adjusted as required.
- Right from the outset of a buddying scheme, a buddy should be preparing the new rep to be less and less reliant on his/her buddy.

## A more formal mentoring scheme

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### What is the difference between a buddy and a mentor?

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There are lots of similarities between buddies and mentors. However, in addition to offering support and encouragement to new reps, mentors are also trained to help with problem solving and coaching reps through difficult situations.

Mentors need to understand the branch's priorities as well as supporting the development of individual reps. Mentors can therefore be part of a whole branch approach, encouraging existing activists and members to become active and engaged around agreed branch and union priorities.

#### How can a branch use trained mentors?

There are lots of ways branches could use mentors:

- As buddies to help new reps get started
- To offer support to existing reps who are developing new skills in areas such as negotiations and more complex representation cases
- To help ensure that reps understand UNISON's priorities and work within agreed branch protocols
- To act as a sounding board to branch officers
- Mentoring training focuses on listening and questioning skills which are useful for all branch officers.

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### Who could train as a mentor?

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Any experienced branch officer or senior rep who has been approved by the branch could train as a mentor.

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## Some key principles for branches wanting to set up a mentoring scheme

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- A branch based mentoring scheme will be much more effective if all branch officers are supportive and aware of the role the mentors will play, so it is recommended that the branch committee is involved in working out how best to set up a mentoring scheme.
- A mentoring scheme is about helping to ensure a consistent approach across the branch, for example in relation to how case work or organising is handled.
- It will be important to agree as a branch some general guidelines for mentors and reps, including on issues such as:
  - Purpose of the mentoring scheme
  - Confidentiality
  - What should be in a mentor ‘contract’
  - How to deal with any problems
  - See pages 22 – 26 for checklists and a template mentoring agreement

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## UNISON's approach to mentoring

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'Mentoring' means different things to different people.

### UNISON's approach

#### Do

- listen;
- use their experience to signpost reps towards key officers or sources of information;
- use questioning skills to help a rep examine a problem and explore options;
- encourage reps to take up and put into practice learning opportunities;
- operate in a framework agreed by the branch committee;
- offer regular support for an agreed, fixed time period.

#### Do not

- replace branch officers – the mentor won't deal with specific issues which branch officers would normally handle;
- tell reps what to do;
- know all the answers to questions reps might ask; act as counsellors.

## Keeping in contact, supporting and developing reps

There is a real challenge for branches in supporting and developing reps in community, voluntary or isolated workplaces. It may be that a member may not meet another member in the course of their work or daily lives. For example, personal assistants may be employed by an individual and work solely in that individual's home. This makes it particularly difficult for reps to meet with other members, to recruit and organise, to build a collective and a sense of community.

The first step is to encourage more members to become active and to keep in regular contact.

Nothing beats a face to face meeting with reps, whether it's with a buddy or mentor, but where it's difficult to actually meet, it's important to keep in contact.

### **Keeping in contact**

- Keep it regular and structured, for example a quick phone call once a week at a set time
- Regular phone chats, catch ups, texts, emails, video conference or video chat such as Skype

### **Building networks and activity**

- Make opportunities for reps to get together, access training and support
- Aim to build networks for support across the branch, employers and the community. Many reps face similar issues and can learn from each other, for example.

### **Make use of online networks**

- **The Organising Space** <https://organisingspace.unison.org.uk>  
launched at the end of August 2014 provides a secure online resource for reps to share ideas, seek advice and peer support
- **UNISON's PA Community** [www.pa-unison.org.uk](http://www.pa-unison.org.uk)  
offers a similar resource specifically for personal assistants

## How can a branch education co-ordinator help...

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### ...with an informal buddy system

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The role will vary, but will include:

- Co-ordinating the work of buddies and offering them support, including the opportunity to network, advice on where to meet and access to relevant information
- Making sure the new rep has a 'named contact' for twice yearly catch ups once the buddying has finished.

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### ...with a more formal mentoring scheme

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- Co-ordinating the activity of mentors in the branch
- Allocating mentors to new or existing reps and offering them support
- Reviewing how the mentoring system is going with the rest of the branch

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### ...in keeping in contact, supporting and developing reps?

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- Thinking of ways to keep in contact, support and develop reps from community, private and fragmented workplaces
- Organising and co-ordinating training for reps together

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### ...UNISON training on buddying and mentoring

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- For branch secretaries – branch leadership development programme
- For buddies – half day workshop (can be run in branches)
- For mentors – mentoring in the UNISON branch course. The course is designed to be used as part of branch development. There is a one day version which can be run with anyone interested in setting up a mentoring scheme. The two day version also focuses on developing the skills of mentors
- For more information, contact your regional education officer on 0845 355 2845

## Practical ideas to encourage reps to become more active

A common complaint from reps is that they are not sure what they should be doing, or how to get started. In these situations, a direct approach from a branch officer or experienced rep can be very helpful.

### **Plan a task that the rep can do.**

— Use the Trained and Active Planning form (TAP) for some suggestions.

### **Make sure the task is well defined and relevant, and make it easy for the rep to get started.**

For example: “I’ve got a branch survey here. Please can you talk through the survey with 5 or 6 members this week? If you could talk to x, y and z in your department that would be great.”

### **Make a note of what you have asked the rep to do and when you will follow it up.**

It demonstrates that the task was a useful one and that you have a genuine interest in the rep’s development.

— Use the buddy or mentor diary

### **Think about suggesting activity which gradually increases the confidence and experience of the rep.**

Think about where the rep is now and the skills and knowledge they need to acquire over a given time period.

### **Make sure you acknowledge and thank reps for the work they have done. There is nothing like being appreciated!**

## How does it work in practice?

### Some examples

“We found that the step of becoming a new rep and taking everything on seemed too daunting and too much in our busy branch that it was putting off members getting involved at all.

We’ve now set up a 6 month mentoring scheme where new contacts and reps shadow a more experienced rep in all parts of the role. They have regular one to one catch ups with their mentor and are invited to branch meetings to meet other reps. They can then decide what their strengths are and what they want to focus on.

We’ve now increased our number of reps across all employers in our branch.”

#### **Branch Secretary, health branch**

“We use the TAP form as part of our induction for all new reps. We keep this in a development folder for each rep with a copy of their training record. Some reps have been able to use it to help them write a CV as it keeps a record of skills and knowledge that they have gained.

We also organise development reviews for each rep throughout the year to talk through their progress and any further support that they may need.

We’ve found that reps are now more likely to keep active in the branch and get involved with all aspects of the branch, including casework. Unless you keep in contact, you’ll lose them...We ask everyone to be involved and follow those up who have an interest in doing something.

We keep in touch by having half an hour meetings for all reps each week to check in and talk through any issues. For those who can’t make meetings because of where they work, we keep in touch by regular texts to check how they’re getting on.”

#### **Branch Secretary, community health branch**

“We buddy up any new rep with a more experienced rep, even if it’s from a different employer. It’s about having someone who can be there for questions and suggestions. Despite being from a different employer and having difficulties with facility time to meet, the questions and issues are the same.”

**Branch Education Co-ordinator, local government branch**

“I naturally ask new reps to come with me and shadow me, but the important bit is what happens next. It’s about giving them a chance to do it themselves next time.”

**Branch Secretary, local government branch**

“As education co-ordinator I meet with the new steward and the mentor regularly. The notes from this development chat are then put in the steward’s development folder...The co-ordinator for the mentors needs to be committed and also have the time to keep mentors engaged in the process.”

**Branch Secretary co-ordinator, health branch**

“The role of the branch education co-ordinator is to support the mentor with the long term view of developing the new steward as a future branch officer”

**Branch education co-ordinator, Local government branch**

## Useful documents

These templates are also available to download from  
[www.unison.org.uk/for-activists/training](http://www.unison.org.uk/for-activists/training)

## Checklist for branch: Setting up a buddying or mentoring scheme in your branch

Discuss and agree the next steps for establishing a mentoring or buddying scheme in your branch

Tasks	Comments
Have you agreed the structure for the scheme? • Who will do what • How you will keep in touch • Who will take responsibility for the scheme in the branch?	
Have you an agreement and protocols which fit your needs?	
How will you select your buddies/mentors?	
Who will you offer support to?	
How will you match buddy/mentor reps?	
What training will be needed for either or both?	
What support will you offer to buddies/mentors?	
Who will arrange this?	
How will you monitor how things are going?	

## Checklist for mentor: Getting started as a mentor

Getting started as a mentor	Comments
<p>Are you clear about the following:</p> <ul style="list-style-type: none"> <li>— What your role is?</li> <li>— The outline of a contract to agree with whoever you are mentoring?</li> <li>— How often you will have contact and when the mentoring will come to an end?</li> <li>— Where to go if there are questions you can't answer?</li> <li>— How to contact your rep?</li> <li>— Where to get support yourself?</li> </ul>	
<p>How will you keep track of your discussions?</p>	
<p>How will you deal with issues of confidentiality?</p>	

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### Model ground rules for mentoring

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At the first session you should agree a contract with your rep that sets out arrangements for mentoring meetings and the parameters and expectations of the mentoring process. A suggested contract, which can be amended or added to, is set out below.

The contract should establish:

- That mentoring is a mutual process
- The start and finish of the mentoring period and approximate length of each mentoring session
- That milestones/goals and the Trained and Active form (if appropriate) for the rep will be agreed at the first session and reviewed at each mentoring meeting.

- That mentoring meetings are confidential and only where agreement is given should matters be shared with others. This includes safe keeping of records of meetings.
- How mentoring meetings will be conducted e.g. face-to-face and/or by phone.
- How differences will be settled

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## **Confidentiality and Data Protection**

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To comply with Data Protection legislation, mentors need to ensure that confidential information such as notes of mentoring meetings are stored securely where other people do not have access to them.

# Sample mentoring agreement

## **We agree:**

- To work together in line with the ground rules agreed
- Mentoring support will be provided for (state time) \_\_\_\_\_ initially.
- To keep a record of mentoring meetings so that progress can be monitored and to store the confidential notes of those meetings securely.
- For telephone meetings, (name) \_\_\_\_\_ will phone (name) \_\_\_\_\_ at the pre-agreed time and will make notes and email / send them to be agreed.
- To respect the confidentiality of these meetings and only to share matters with others where agreement is given and noted on the record form.

## **Any additional points**

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## **Contact details**

### **Mentor**

Tel: \_\_\_\_\_ Email: \_\_\_\_\_

### **Rep**

Tel: \_\_\_\_\_ Email: \_\_\_\_\_

Mentor's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Rep's signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Buddy or mentor diary**

Milestones – when I should contact the new rep	Date of contact	Any key outcome	Date fixed for next contact

# Developing and supporting activists



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## Trained and active plan

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Revised October 2013

As a new workplace rep, UNISON is committed to supporting your training and development. Your branch will help you get on the relevant training courses and will allocate you a named contact who will be able to:

- answer your questions
- put you in touch with the information and people who can help you along the way
- have a regular catch up as you become more active in the union.

UNISON also encourages you to be proactive in seeking out opportunities to put your training into practice.

To get started, sit down with your contact in the branch and complete this short questionnaire together. There is space here for you to come back to each point later on so you can make a note of how things are going in each key area.

## About me

Name

.....

**Membership number** (useful to note as you will need this eg for course applications)

.....

**Branch**

The members I represent are based in the following workplace(s)

.....

.....

.....

**Other**

.....

.....

## Important information and contact details

**My branch secretary name and contact details**

Name

.....

Tel

.....

Email

.....

**My branch contact or mentor and details**

Name

.....

Tel

.....

Email

.....

**Other key contacts**

Name

.....

Tel

.....

Email

.....

✓ Tick in the box when you can say 'yes' to the following:

**I've got a copy/copies of:**

**Notes**

The Code of Good Branch Practice

UNISON Rule Book

Recent branch newsletters

Branch equality policies

Dates for branch committee and other relevant branch meetings in diary

Dates for training over the next year in diary

Information about UNISON's national and regional website

UNISON application forms

Names and contact details of branch officers and reps

# Trained and Active plan

Use this plan as part of regular catch ups with your branch contact.  
 You don't need to fill them all in to start with – and remember, there's lots of training available to help you.  
 It's split into sections –

**Part A** – Tasks that you can do before the organising stewards course or reps training with some help from your branch contact.  
**Part B** – Some general tasks for all reps  
**Part C** – More specific ones for stewards, health and safety reps, union learning reps and equality reps.

## PART A – Some tasks that you can do before the organising stewards course or reps training with some help from your branch contact.

	Am I confident about this?	Need some help? This could be shadowing another rep	Action agreed at first meeting with your contact. Date:	Update and follow up actions at 2nd meeting. Date:	Doing it!
Talking to friends and family about UNISON					
Finding out who are members in your workplace					
Finding out about UNISON's campaigns					
Talking to colleagues about joining UNISON					

**PART A – continued**

	<b>Am I confident about this?</b>	<b>Need some help? This could be shadowing another rep</b>	<b>Action agreed at first meeting with your contact. Date:</b>	<b>Update and follow up actions at 2nd meeting. Date:</b>	<b>Doing it!</b>
<b>Reading and passing on information that is sent to me by the branch</b>					
<b>Keeping noticeboards up to date</b>					
<b>Using the internet and email to keep up to date on relevant UNISON issues</b>					
<b>Keeping in contact with your branch contact</b>					

### PART B – Some general tasks for all reps

	Am I confident about this?	Need some help? This could be shadowing another rep	Action agreed at first meeting with your contact. Date:	Update and follow up actions at 2nd meeting. Date:	Doing it!
Recruiting new members					
Talking through a problem at work with a member					
Keeping in contact with lead branch officer or convenor					
Talking to a manager about a member's issue					
Carrying out a survey with members					
Organising a meeting of members					
Recognising what could be equality issues					
Encouraging others to become more active					

# Trained and Active plan

**PART C – Some more specific tasks for stewards, health and safety reps, union learning reps and equality reps.**

## Additional points for stewards

	Am I confident about this?	Need some help? This could be shadowing another rep	Action agreed at first meeting with your contact. Date:	Update and follow up actions at 2nd meeting. Date:	Doing it!
Representing a member at a grievance or a disciplinary					
Supporting a senior steward at a grievance or disciplinary					
Getting involved with branch level activity or campaigns					
Keeping an up to date workplace 'map'					
Representing the views of your members at branch					
Shadowing a more experienced steward during negotiations					

### Additional points for learning reps

	Am I confident about this?	Need some help? This could be shadowing another rep	Action agreed at first meeting with your contact. Date:	Update and follow up actions at 2nd meeting. Date:	Doing it!
Giving support to members getting involved in learning for the first time					
Asking questions to help find out what a member's training needs might be					
Talking confidently about skills for life issues					

### Additional points for health and safety reps

	Am I confident about this?	Need some help? This could be shadowing another rep	Action agreed at first meeting with your contact. Date:	Update and follow up actions at 2nd meeting. Date:	Doing it!
Raising health and safety issues with the relevant person					
Organising a health and safety inspection					
Talking confidently about risk assessments					

# Trained and Active plan

## Additional points for equality reps

	Am I confident about this?	Need some help? This could be shadowing another rep	Action agreed at first meeting with your contact. Date:	Update and follow up actions at 2nd meeting. Date:	Doing it!
Talking confidently about types of discrimination					
Identifying good and bad practice around equalities in the workplace					
Asking questions to help find out what a member's equality issues might be					
Knowing who else to work within the branch on equalities issues					

## Record form for catch up with named contact

<p><b>How have things gone since we last met?</b></p>	<p><b>Follow up action – by when</b></p>
<p><b>What went well?</b></p>	
<p><b>What hasn't gone so well?</b></p>	
<p><b>Any queries or problems and what can be done about them?</b></p>	
<p><b>Review of action agreed last time – how did it go?</b></p>	<p><b>Any follow-up action</b></p>
<p><b>What is coming up next and what help and support might you need?</b></p>	<p><b>Any follow-up action</b></p>
<p><b>Date and venue of next meeting</b></p> <p>_____</p>	
<p><b>Signed</b></p> <p>Mentor's signature: _____ Date: _____</p> <p>Rep's signature: _____ Date: _____</p>	







