Your role as Branch Education Co-ordinator is vital in ensuring that activists and reps are trained and supported to carry out their roles effectively.

Your first task as a new branch officer is to sign up for Branch Education Co-ordinator training. This will give you the knowledge, skills and confidence to carry out this role and enable you to meet other branch education co-ordinators.

The purpose of this guide is to help you set up systems for co-ordinating and keeping records of learning in your branch and to signpost you to information to help you carry out your role.

Follow the index below to find out more about:

- What a Branch Education Co-ordinator does ........................................3
- Training for Branch Education Co-ordinators........................................4
- Keeping training records ........................................................................5
- Data Protection..........................................................................................8
- Planning and managing the branch education budget............................9
- Developing and Supporting Activists ......................................................14
- Training for activists .............................................................................15
- Learning and Organising Workshops ......................................................17
- Activists – Time off for Training ............................................................17
- Learning for Members ............................................................................18
- Membership Development ......................................................................19
- UNISON’s Educational Bursary Fund ....................................................19
- Model forms ...........................................................................................21
What a Branch Education Co-ordinator does

The Branch Education Co-ordinator's role is set out in UNISONs ‘Code of Good Branch Practice’. Your branch may also have a Branch Life Long Learning Coordinator with whom you should work closely.

** The branch Education Co-ordinator leads on activist learning and the branch Lifelong Learning Coordinator leads on member learning.

Tasks relating to the post of branch education coordinator include:

- making sure all new stewards and reps receive information about the branch and their duties, e.g. stewards handbook, Rulebook, service conditions agreements, etc
- publicising the range of educational and training opportunities available to members and activists, and making sure that all reps complete appropriate training for their role
- talking to existing reps about their ongoing training and development needs;
- supporting and co-ordinating the work of buddies and mentors in the branch.
- co-ordinating and supporting the work of union learning representatives (only where a Branch Lifelong Learning Co-ordinator is not in place, if the branch does have a LLC then they will support ULRs).
- maintaining contact with the regional education officer/ regional learning and organising committee
- organising a plan of training for activists and producing an annual budget to meet its costs
- keeping records of who completes courses in the branch and when
- negotiating with the employer, along with union learning reps on issues relating to learning including time off
Training for Branch Education Co-ordinators

Signing up for Branch Education Co-ordinator training is your first step in getting started in your role. To apply for Branch Education Co-ordinator training or to find out when and where this course will next be delivered in your region, contact your regional education officer. UNISONdirect, Tel: 0800 0 857 857, can provide contact details for your region.

The Branch Education Co-ordinator course will provide you with the knowledge, skills and confidence to successfully carry out your role. After completing the course you will:

- Understand the role and function of branch education co-ordinators and the branch education team
- Understand the role of education and training in UNISON organisation development
- Be aware of the education and training opportunities available in UNISON
- Have explored ways of assessing the education and training needs of the branch, activists and members
- Be able to develop a plan for buddying and mentoring new workplace representatives
- Have experience of drawing up a branch education plan
- Know how to plan a branch education event and recruit participants

NB Once you are elected, do check that your branch has updated your WARMS record to note your Branch Education Co-ordinator status and that your contact details, particularly email if available, are correct.
Keeping Training Records

You will need to know who has completed training for their branch role in order to plan for future training and development for the reps and activists in your branch.

Establishing a Training Record

To start with you will need to get hold of the following lists:

- A list of all the activists in your branch on RMS (replacement membership system) in A-Z order of last name
- A list of all the activists in your branch on RMS in order of RMS Activist Role Code
- A List of RMS Activist Role Code numbers and what they mean

As most branches are now ‘live’ on RMS through WARMS you should be able to get these lists locally.

Once you have these lists, contact your regional learning and organising team to get a copy of the AMT (activist and member training system) training history for your branch. You’ll also be able to get this report from WARMS in the near future so contact your branch WARMS user for this information when it’s available.

Then you need to systematically contact every activist in the branch to check:

- which posts they hold
- how long they have been in the post
- what trade union education they have completed during the last 5 years

To do this you may need the help of others in the branch, especially the branch Union Learning Reps (ULRs). In large branches, you will need help from all the senior stewards and Branch Officers.

This may seem an onerous task but this exercise will have the added benefit of introducing yourself to your branch activists and in turn they will know who to contact with any training queries they may have.
As you make contact with activists you will need to record information to establish training history records and update the RMS records. To help you UNISON has produced a guide, Developing and Supporting Activists.

You can order a copy of the Guide via the UNISON Online Catalogue, Stock No. 2883, or download it from https://www.unison.org.uk/get-involved/learning-development/activists/activist-training-pathways/. This contains the Trained and Active Plan for reviewing development needs with your branch reps and officers. An online Word version of this Plan can also be downloaded from the same webpage or you can order a paper version from the online catalogue, Stock No. 2919 https://www.unison.org.uk/get-involved/in-your-workplace/key-documents-tools-activists/online-catalogue/.

Setting up your own Record Keeping System

You may like to use the model Training Record Form at the back of this document to keep track of the courses each rep completes.

NB THIS IS A SIMPLE SYSTEM – FILE IN NAME ORDER – A SHEET FOR EACH ACTIVIST. You may wish to copy this to an Excel spreadsheet but remember you may not always be the Education Coordinator for the Branch. The person taking over from you will need to be able to use your system, so keep it simple and accessible for all.

You can file these forms with any Trained and Active Planning Forms, mentioned above, to keep a record of your meetings with activists, their training needs and any follow-up action agreed between you.
**Maintaining Training Records**

Reps and activists must complete an application form for every course they attend and either you or the branch secretary will need to sign these to give branch approval to attend. As the section on managing the branch education budget below explains, this is important as giving approval to attend means the branch becomes responsible for participants' course costs, travel and subsistence. You should keep a copy of all application forms completed in the branch with the person's training record. It is good practice to contact course participants after their course to discuss how they got on and to ensure they have some opportunities to put what they learned into action.

Some regions use a 3-part carbonised action-planning form on certain courses on which participants record what they will do as a result of attending the course. Where you can, offer support and encouragement to them to complete these actions, or where you can identify with them some practical tasks they can carry out to get started, it is a great way to build their confidence and skills and help them get active in their role.

At the same time you can ask them to let you have a copy of any course attendance certificate they received for their training record.

If you have members attending TUC courses, it can take a while for course registers to reach UNISON and consequently for the training database to be updated. You can give them a copy of the UNISON Course Attendance Certificate from the back of this document to complete on the last day of the course and ask the tutor to sign it. The certificate should then be returned to you so that you can add it to their training record.
Data Protection and Keeping Records Securely

It is important to ensure that people’s rights under the Data Protection Act ("DPA") and the General Data Protection Regulation ("GDPR") are upheld. These are laws that ensure organisations adhere to certain principles when collecting personal data (information about people). They apply to the collection, storage and use of personal data at all times.

“Personal data” is any information about a living person which enables them to be identified, so when information is being collected about people we are dealing with personal data and it is very important to ensure that:

- People are made aware what data you are collecting about them, what you are using their data for, and how long you will retain it.
- People are given the chance to opt out of their personal data being collected (if someone objects, you should delete any data you have already collected from them.)
- You only collect the personal data you need for each purpose.
- You keep the collected information safe and secure:
  - if you keep a paper based record, ensure that the paper is kept in a secure, lockable filing cabinet
  - if you keep the information electronically, please ensure the relevant document is password protected
- Only share the collected information with branch officials, and ensure that you do not inadvertently disclose the collected information to others (e.g. by taking your paper record around with you and completing the entry about each individual in front of others)
- You do not keep the information for longer than is necessary. Ideally the information will be updated when you update the exercise, and the original information will be deleted or destroyed
- You delete electronic files and destroy paper records in such a way that they cannot be seen by other people. If you keep a paper record, please destroy by shredding, or put in the confidential waste to be securely destroyed.
If a member asks for a copy of their own personal data, e.g. their training record - they may refer to this as a Subject Access Request (SAR) - you should either:

- **Verbal Requests:** tell them to write to the Data Protection Office at the UNISON Centre, 130 Euston Road, London NW1 2AY, and let them know that there is a fee which can be paid by cheque or postal order.

- **Written Requests:** Pass the request (letter, email, etc.) to your branch secretary immediately so that they can take it forward. As the union must respond within 40 days to avoid breaching the DPA, it is important that requests are forwarded quickly.

Do not give your member information from their file as it will almost certainly contain the personal data of others, which you must not provide to your member.

Branch guidance to Data Protection can be found here [https://www.unison.org.uk/content/uploads/2015/04/On-line-Catalogue22957.pdf](https://www.unison.org.uk/content/uploads/2015/04/On-line-Catalogue22957.pdf)

NB – New regulations regarding the GDPR (General data Protection Regulations) are coming into effect in May 2018 and new guidance will be published when available at that time.
Planning and managing the branch education budget

Managing the budget

You should encourage all activists to undertake at least the basic training for their role. As they undertake more duties in the branch, then follow on courses and refresher courses can be considered. There should be no question about branch funds covering this training – it is a prime duty of the branch to ensure all of its members and activists are offered the opportunity to access UNISON education and branches should therefore budget accordingly.

You will need to authorise each course application and regularly report to the Branch Treasurer which branch activists have attended courses as the branch is responsible for any course fees, travel and meal expenses. The branch should also pay for overnight stays should the participant have practical travel difficulties. If a participant cannot attend the course because of dependant care issues the branch should look into how these could be alleviated (paying for extra time at day nursery etc). This is why it is important your records are accurate in the branch.

Planning the Education Budget

The key fact to bear in mind when considering budgets is that learning comes into UNISON's Objective One – “building capability to meet the current recruiting, organisational and representational challenges” this is the union's number one priority.
You should review branch training needs each autumn and liaise with your Branch Treasurer or branch officer team in line with regional processes to agree a branch education budget for the year ahead. Having up to date training records for your branch is the most useful starting point for this.

There are many ways you can estimate spend on learning in the branch. Here are two examples to serve as illustrations. They both include a split between funds spent on educating activists and those spent on member education.

1. A Generic budget

This is an easy way of estimating expenditure if you have not been used to budgeting and are not sure how much things will cost or the exact demand over the coming year.

You can estimate that of the existing activists around 20% will need to attend a course and say that a notional £200 per episode will be required for course fees, travelling and subsistence expenditure. Therefore if you have 100 activists, 20 x £200 would give a budget of £4000.

You can estimate the branch will want to be involved in 5 Life Long Learning initiatives throughout the year and say that these episodes will cost around £200 giving a budget of £1000.

This example produces a total budget of £5000 for a medium sized UNISON branch.

Obviously you can experiment by varying the percentages and the notional amounts until you feel you have it about right for your branch – depending on its size, the number of activists, whether your employer is keen on the learning agenda etc.
2. A Targeted budget

This is a more sophisticated way of budgeting. However, in order for this type of budget to work, you must have information at your finger tips, for example:

- how many of the existing activists need what kind of training and when?
- what will be the likely recruitment of new activists and what are the priorities shown in the joint branch assessment?
- how much will course fees, travelling and subsistence actually cost?

This type of budget will vary from branch to branch depending on size, number of activists and number of activists needing training.

For simplicity, in the example targeted budget that follows target numbers appear in brackets, fees are estimated at £20 per person per day and travelling is estimated at £10 per person per day.

If you are a new Branch Education Co-ordinator and / or Branch Lifelong Learning Co-ordinator you may need to discuss these ideas with your other branch officers – but please remember – learning forms part of UNISON first objective and therefore your budget needs to reflect this level of priority.
**Branch Education Co-ordinators - Starter Pack**

Example of a Targeted Budget:

<table>
<thead>
<tr>
<th>Activist Training : Initial basic Training Courses</th>
<th>Fees</th>
<th>Travel</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Branch briefings for new contacts (10)</td>
<td>£150</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UNISON Organising Steward Course (5)</td>
<td>£500</td>
<td>£250</td>
<td></td>
</tr>
<tr>
<td>UNISON Organising for Health and Safety Course (3)</td>
<td>£300</td>
<td>£150</td>
<td></td>
</tr>
<tr>
<td>UNISON Branch Officer Development Programme (3)</td>
<td>£600</td>
<td>£300</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activist Training : Follow on Courses</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>UNISON Stewards Refresher (5)</td>
<td>£100</td>
<td>£100</td>
<td></td>
</tr>
<tr>
<td>UNISON Representation Skills (3)</td>
<td>£180</td>
<td>£90</td>
<td></td>
</tr>
<tr>
<td>UNISON Mentoring (2)</td>
<td>£180</td>
<td>£90</td>
<td></td>
</tr>
<tr>
<td>UNISON Organising Skills (4)</td>
<td>£240</td>
<td>£120</td>
<td></td>
</tr>
<tr>
<td>TUC Stage 2 Health and Safety (1)</td>
<td>£150</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total for Activist Training**

£3,600

<table>
<thead>
<tr>
<th>Resources</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>LRD Employment Law book(12)</td>
<td>£300</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case worker 'Kit' folder paper pen (12)</td>
<td>£120</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mentor/Mentee 'kit' (12)</td>
<td>£120</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total for resources**

£540

<table>
<thead>
<tr>
<th>Life Long Learning</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning at Work Day event</td>
<td>£250</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travelling for (10)places on Saturday learning</td>
<td>£250</td>
<td></td>
<td></td>
</tr>
<tr>
<td>club events</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Women's Lives for (15) branch/employer partnership</td>
<td>£150</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taster for (10) Polish workers in Laundry –</td>
<td>£150</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conversational English</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>iPad as prize for branch 'best' learner award</td>
<td>£350</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total for Lifelong Learning**

£1,150

**GRAND TOTAL**

£5,290
Branch Education Co-ordinators - Starter Pack

Developing and Supporting Activists

The most effective way you can support new and existing reps is by encouraging them to complete training and to then make it as easy as possible to put what they learn into practice. The 'Developing and Supporting Activists Guide' has lots of ideas on supporting reps to get to grips with their role and get active in their workplace - Stock No. 2883 from the Online Catalogue or download from https://www.unison.org.uk/get-involved/learning-development/activists/activist-training-pathways/.

It offers ideas on:

- Keeping track of training in your branch
- Setting up a buddying or mentoring scheme in the branch to support new reps
- Holding catch up meetings with existing reps
- Working with branch officers and your regional organiser to develop a branch training and development plan

Whether you co-ordinate a system for developing and supporting reps in your branch or work directly with them yourself, the new Trained and Active planning form will help to structure meetings with reps and maintain a record of what was discussed so you can follow up on progress. It is available:

- As an online Word version that you can enter to and save/share as needed https://www.unison.org.uk/get-involved/learning-development/activists/activist-training-pathways/
- As a paper version to order from the online catalogue, Stock No. 2919
Training for activists

Which courses should activists take first?

UNISON is keen that all reps receive basic training for their role as soon as possible after election and certainly within six months. As they take on more duties in the branch, then follow-on courses and refresher courses can be considered.

For those activists who undertake representation work and handle cases in the branch UNISON requires that they take appropriate refresher courses at least every five years. You can find out from your regional education officer which courses are offered as refresher training in your region.

For those activists who undertake representation work and handle cases in the branch UNISON requires that they take appropriate refresher courses at least every five years. You can find out from your regional education officer the dates that refresher training is offered in your region.

All newly elected workplace stewards are sent a link inviting them to complete the New Stewards e-note, this is basic introductory training in which they: Learn about the role of the steward in UNISON; Get signed up to training; think about their first steps in the role. Reps access this via https://e-learning.unison.org.uk/. Reps should then sign up for the Organising Steward course as soon as they can. The course has recently (Jan 18) been re-designed to cater for newly elected and less experienced UNISON stewards. Stage 1 is part one of a steward’s initial training and will help equip them with organising skills understand the role of an organising union, on the course they will learn how to: work with members and more experienced stewards to resolve issues; know where and when to seek advice and guidance; recognise the importance of equalities in UNISON; understand how procedures work in practice; understand the broader roles in which UNISON operates and to plan their next steps in UNISON.
For those who would like to go on to develop their representation skills, we recommend Stage 2 of the stewards’ training on which stewards will learn how to: identify what is and isn’t a case; understand available resources to help representation i.e. the Acas code; practise interviewing witnesses; prepare for a grievance and a disciplinary case; build confidence in representation.

As most regions are running this course over five days stewards will be signing up for both parts. Please see your regional education programme for details of how the course will be run in your area.

Once a workplace rep has completed UNISON’s Organising Steward course or a refresher course, they will be given ERA certified steward status (Employment relations Act 1999). You will be able to find out from your branch WARMS (Membership database) records who needs to complete basic training to achieve ERA certification status and who needs refresher training.

There should never be any question about branch funds covering this training: it is a prime duty of the branch to ensure all of its activists and members are offered the opportunity to access UNISON education and branches should therefore budget accordingly.

Finding out more about training

- **UTrain**: Reps need a range of skills and knowledge to do their job and the U-train map (Stock no. 2730 from the Online Catalogue) shows you the training routes available to develop those skills and knowledge.

- **Your Regional Education programme**: every region publishes an education programme each year giving details, dates and venues of training offered across the region. To find out what is available in your region, request a copy of this from your regional education officer.
  Phone UNISONdirect, Tel: 0800 0 857 857, for their contact details.

- **National Programme**: some activist courses are organised from UNISON Centre and details of these courses can be downloaded from the Resources section on [https://learning.unison.org.uk/national-courses/](https://learning.unison.org.uk/national-courses/)

- **On Line Courses**: our e-learning site hosts a number of online learning modules (‘e-notes’) for UNISON members. They are free to UNISON members and activists. Details can be found at [https://e-learning.unison.org.uk](https://e-learning.unison.org.uk)

Running courses in your branch

It is often possible to run UNISON courses and workshops in your branch. Contact your Regional Organiser or Regional Education Officer to find out how the region can assist you in organising a branch-based course or workshop.
Learning and Organising Workshops

A range of short workshops has been developed for delivery in branches to help with organising and engaging members. They vary in length from one hour to half a day and cover a wide range of topics including organising recruitment and campaigning; service group issues; legal, privatisation and transfers; general skills development; member development learning; political education; and women’s history and campaigning.

Visit https://www.unison.org.uk/get-involved/learning-development/activists/branch-development/ for a summary of each of the workshops. If you would like to run any of these in your branch, speak to your regional education officer or organiser.

Discussion leaders training and lay tutor training is also available to help you or other branch reps or officers develop confidence in delivering these short workshops - contact your regional education officer for more information.

Activists – Time Off for Training

Stewards, health and safety reps, union learning reps and branch officers have a right to paid time off for training in their union duties in most workplaces. This also applies to part-time activists and those who take part in online courses.

It is best to advise members to give several weeks notice to employers and to provide managers with information about the course as required. If you or activists in your branch are experiencing difficulties in obtaining time off for union training, contact your region
Learning for Members

UNISON’s Free Member Learning Offer

UNISON is offering members free one day “taster” learning workshops as an introduction to UNISON learning. The workshops available are:

- **Your skills, your future**: identifying and developing your skills, increasing confidence and celebrating your successes
- **Facing change together**: practical ways to help and support each other during times of change or uncertainty at work and ways the union can help and advise.
- **Making the most of the Internet**: searching the internet; emails and attachments; staying safe online; using the internet to save money
- **Power To Be You**: improving self-esteem, sharing tips and ideas for addressing confidence and assertiveness issues, raising awareness of UNISON education and development opportunities, and helping participants to speak up with confidence
- **Get That Job**: discussing feelings about applying for jobs, identifying existing levels of confidence in relation to work and personal life, acknowledging strengths and skills, exploring the job application process and application forms, increasing confidence in demonstrating skills and experience on application forms, particularly in relation to the Person Specification

To find out more contact the National Learning and Workforce Development Officers - either Clair Hawkins – c.hawkins@unison.co.uk or Hazel Marsh – h.marsh@unison.co.uk
Membership Development in UNISON

UNISON offers Introduction to study courses, for members only, which are designed for adults to build self-confidence, widen horizons and help progress at work. The courses are free and no exams are involved. Courses on offer are:

- Return to Learn
- Women’s Lives

To find out more about these courses contact Lorraine Mirham, National Learning and Workforce Development Officer, l.mirham@unison.co.uk or Davinder Sandhu, d.sandhu@unison.co.uk

UNISON’s National Bursary Scheme

UNISON learning grants are available to members for financial help with fees or course costs for trade union and labour movement studies and women's studies.

Learning grants are also available for members taking other courses up to degree level.

For each grant members must be personally paying the course fee – full details of the eligibility criteria is on the website (link below)

Learning discounts for UNISON members

Members can also get some fee discounts for distance learning.

For more information on the Bursary Scheme and learning discounts, visit https://www.unison.org.uk/get-involved/learning-development/financial-support/
Model forms

You may like to copy the forms on the next few pages to help you maintain training records in your branch.
# Branch: Activist Training Record Form

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Membership Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WORK Telephone</th>
<th>HOME Telephone</th>
<th>MOBILE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UNISON Post(s) currently held</th>
<th>Date Started</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Where (s)he has requested mentoring, name of buddy/mentor:

Where (s)he is buddying/mentoring another rep, name of that rep:

<table>
<thead>
<tr>
<th>Course and dates</th>
<th>Date Authorised</th>
<th>Time Off Check</th>
<th>Attendance Check</th>
<th>Follow up</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
UNISON Course Attendance certificate

To be completed by the participant on the final course day and signed by the tutor

Name ........................................................................................................................................
UNISON Branch ........................................................................................................................
I am employed by ......................................................................................................................
I have attended the course ......................................................................................................
................................................................................................................................................

Dates
Venue ......................................................................................................................................

Tutor’s name ............................................................................................................................
I can confirm that this student has attended all sessions of the above course.

Tutor’s signature ......................................................................................................................
Date ...........................................................................................................................................

Students please note you may need this certificate to claim expenses and you will need it to copy to your branch education co-ordinator to maintain the record of your training history