Trained and active plan

Revised October 2013





Introduction

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 asks 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  Tel  Email |
| My branch contact or mentor | Name  Tel  Email |
| Other key contacts | Name  Tel  Email  Name  Tel  Email  Name  Tel  Email |

Tick ✓ the row when you have a copy/copies of the following:

|  |  |
| --- | --- |
|  | 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 |

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** | | | | | |
| --- | --- | --- | --- | --- | --- |
| *Please* ✓ *tick box  or write in box  as appropriate*  | 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 second 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 |  |  |  |  |  |
| Reading and passing on information that is sent to me by the branch |  |  |  |  |  |
| Keeping noticeboards up to  date |  |  |  |  |  |
| Using the internet and email to keep up to date on relevant UNISON issues |  |  |  |  |  |
| Keeping in touch with your branch contact |  |  |  |  |  |

| **PART B – Some general tasks for all reps** | | | | | |
| --- | --- | --- | --- | --- | --- |
| *Please* ✓ *tick box  or write in box  as appropriate*  | 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 second 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 |  |  |  |  |  |

| **PART C – Some more specific tasks for stewards, health and safety reps, union learning reps and equality reps** | | | | | |
| --- | --- | --- | --- | --- | --- |
| **Additional points for stewards** | | | | | |
| *Please* ✓ *tick box  or write in box  as appropriate*  | 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 second 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** | | | | | |
| --- | --- | --- | --- | --- | --- |
| *Please* ✓ *tick box  or write in box  as appropriate*  | 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 second 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** | | | | | |
| --- | --- | --- | --- | --- | --- |
| *Please* ✓ *tick box  or write in box  as appropriate*  | 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 second meeting.  Date: | Doing it! |
| Raising health and safety issues with the relevant person |  |  |  |  |  |
| Organising a health and safety inspection |  |  |  |  |  |
| Talking confidently about risk assessments |  |  |  |  |  |

| **Additional points for equality reps** | | | | | |
| --- | --- | --- | --- | --- | --- |
| *Please* ✓ *tick box  or write in box  as appropriate*  | 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 second 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 with in the branch on equalities issues |  |  |  |  |  |

Record form for catch up with named contact

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