**Branch Education Co-ordinators’ Starter Pack**

November 2021



Getting started

Your role as Branch Education Co-ordinator is vital in ensuring that reps and activists 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 to 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.

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What a Branch Education Co-ordinator does

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| The Branch Education Co-ordinator’s role is set out in UNISON’s Code of Good Branch Practice. Your branch may also have a Branch Lifelong Learning Co-ordinator with whom you should work closely.  The Branch Education Co-ordinator leads on activist learning.  The Branch Lifelong Learning Co-ordinator leads on member learning. |  |

Tasks relating to the post of Branch Education Co-ordinator 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 an 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.

You can find contact details for your regional education office on the LAOS website here: <https://learning.unison.org.uk/regional-education-teams/> or by calling UNISONdirect on 0800 0 857 857.

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 be able to:

* 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
* explore ways of assessing the education and training needs of the branch, activists, and members
* develop a plan for buddying and mentoring new workplace representatives
* develop a branch education plan
* know how to plan a branch education event and recruit participants

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| **NB** Once you are elected, check that your branch has updated your details on the membership database (WARMS) to record your Branch Education Co-ordinator status and that your contact details, including email, are correct. Please also ensure that the equalities data UNISON holds for you is up to date and complete – this helps us to ensure equality of access to activist positions. |

Keeping Training Records

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

**Establishing a Training Record**

UNISON’s membership database is called RMS and most branches have „live access to the RMS database through the WARMS system. Branch Membership Officers or branch WARMS users should have access to this.

1. To start with, ask your branch for a list of the following:

* A list of all the activists in your branch (A-Z order of last name or organised by employer)
* A list of all the activists in your branch in order of RMS Activist Role Code
* A List of RMS Activist Role Code numbers and what they mean

1. Then, work through the documents to cross-check that the activists have completed the correct training (see page 14 for more details).
2. Once you have these lists, contact your regional education team to get a copy of the AMT (activist and member training system) training history for your branch.
3. Next, plan 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 you to your branch activists and in turn they will know who to contact with any training queries they have.

As you contact activists you will need to record information to establish training history records and update the RMS records.

There is a simple training record template form at the back of this starter pack that can be completed for each activist. UNISON encourages each activist to have a **Trained and Active plan**.

The UNISON guide, **Developing and Supporting Activists** has more information and template trained and active forms.

Please see page 14 for more information on developing your reps and links to the trained and active plans.

Make sure you file any training records or trained and active plans securely and in line with UNISON’s data protection guidelines (see page 8 below).

**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 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 record of all training approved in the branch as part of the 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 action-planning forms 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.

Where you have members attending face to face TUC courses, 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. If you get a copy, please scan it and send it in to the course administrator at your regional office so that the training database can be updated.

Data Protection and Keeping Records Securely

When representing members, it is important to ensure that members’ rights under the Data Protection Act (DPA) and the General Data Protection Regulation (GDPR) are upheld in every activity carried out.

Members have the right to know that we are collecting and using information about them, and that their information is kept safely and securely. In addition, the member has a right of “subject access”.  This means that they can make a request to see all information UNISON holds about them - this will include paper files and electronic files including spreadsheets and emails.

You will be collecting some sensitive information from the member during the representation process, and so it is very important to ensure the following:

* The member must be made aware that you will be collecting and recording information about them (sounds obvious, but we need to let them know)
* Confidentiality and privacy are maintained at all times
* Case forms and other relevant employment case documents are stored securely, and in a lockable cabinet
* Electronic information should be password protected if possible
* Paper forms should not be left in an open office, and computer screens should be locked when you are away from your desk
* Only share information with people who have a justifiable reason to see it
* Consult your branch about how information should be filed in paper files/electronic folders so that any subsequent “subject access” requests from members can be dealt with efficiently
* Do not commit to paper or electronic documents any opinions or other information that you would not wish the member to see
* Check with your branch what system you must follow when you remove a file from a filing cabinet so that the branch can log and track where case files are at any time
* Do not discuss confidential matters over the phone if you are in a public place or an open plan office – go somewhere private.

Branch guidance on Data Protection can be found here: <https://www.unison.org.uk/content/uploads/2018/03/UNISON-Branch-Data-Protection-Handbook-updated-February-2018.pdf>

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| **NB Requests from members for their personal data**  A member may ask for a copy of their own personal data e.g. their case file. However they make the request (for example via email, verbally, through social media etc.) and however they phrase it this should always be treated as a Subject Access Request.  When you get a request, you should immediately send details by email to the UNISON Data Protection Officer at [dataprotection@unison.co.uk](mailto:dataprotection@unison.co.uk) copying in your regional data protection contact.  Full details of how to recognize a subject access request are available in the Branch guidance on Data Protection, Appendix 3.  **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.** |

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| **NB Suspected data protection breaches**  Under Data Protection Regulation, a data breach is: “a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure or access to personal data”. Examples you might see as a BEC include:   * Leaving a case form on a bus * A UNISON laptop or mobile phone is stolen * Confidential waste is disposed of insecurely * A list of members is saved in a publicly accessible location * Using the To or Cc field to send a bulk email instead of the Bcc field * Sending an email to the incorrect person with the same name as the intended recipient   This list isn’t exhaustive, you can find more examples in the Branch guidance on Data Protection, Appendix 4  You should always report a suspected breach or near miss to the UNISON Data Protection Officer on 0207 121 5237 or [dataprotection@unison.co.uk](mailto:dataprotection@unison.co.uk) as soon as they are discovered. If in doubt, call anyway!  **If you haven’t done so already you should complete the UNISON GDPR e-note as soon as possible, details overleaf.** |

**UNISON GDPR e-note**

As a BEC, you will have some dealings with members' personal data. This might include people’s names, financial details, home and email addresses, age, or gender. And, because membership of a trade union is classed as ‘sensitive personal data’, it requires extra care.

UNISON has created an e-note (a short online learning module) that covers the main data protection issues that you need to be aware of as a UNISON activist. It outlines the scope and requirements of the law and explains what you should do to ensure that you and your branch don't breach the GDPR (general data protection requirement).

To complete this activity, you need to:

1. Create an account on MyUNISON (you may already have done this, if you’ve ever used the Organising Space or My Details)
2. If you have any difficulty creating or accessing a MyUNISON account, please get in touch with UNISONdirect for assistance via their online form <https://www.unison.org.uk/get-help/online-enquiries/> or by calling them on 0800 0 857 857
3. Log in to the e-learning site at <https://e-learning.unison.org.uk>
4. Find the course (you can find it under the category ‘More for activists’, linked from the front page, or go directly to <https://e-learning.unison.org.uk/course/view.php?id=42>)
5. Select ‘Enrol me’. This will give you access to the e-note.
6. Select ‘Data protection and the GDPR – click this link’. Then select ‘Start’.
7. The module should take you around 20 minutes to work through. Be sure to complete the quiz at the end of the module and select ‘Complete’ at the end – this ensures that your learning will be recorded.

It works best on desktop computers or laptops. There is also a text-only version for users who have difficulty using the interactive version. This also includes the quiz at the end, and you will need to complete this and submit it so that your learning is recorded.

If you experience any problems getting into the site, please contact [learningandorganising@unison.co.uk](mailto:learningandorganising@unison.co.uk)

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 that branch funds will cover 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 dependent 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 activist education and member learning is integral to UNISON’s number one objective to “enhance our capability to recruit and retain members and meet the organising and representation challenges facing the union in the changing world of work”.

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| 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 Lifelong 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, for this type of budget to work, you must have information at your fingertips, 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’s first objective and therefore your budget needs to reflect this level of priority.

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| **Example of a Targeted Budget** | | | |
| **Activist Training: Initial basic Training Courses** | **Fees** | **Travel** | **Totals** |
| Branch briefings for new contacts (10) |  | £150 |  |
| UNISON Organising Steward Course (5) | £500 | £250 |  |
| UNISON Organising for Health and Safety Course (3) | £300 | £150 |  |
| UNISON Branch Officer Development Programme (3) | £600 | £300 |  |
| **Activist Training : Follow on Courses** |  |  |  |
| UNISON Stewards Refresher (5) | £100 | £100 |  |
| UNISON Representation Skills (3) | £180 | £90 |  |
| UNISON Mentoring (2) | £180 | £90 |  |
| UNISON Organising Skills (4) | £240 | £120 |  |
| TUC Stage 2 Health and Safety (1) |  | £150 |  |
| **Total for Activist Training** |  |  | **£3,600** |
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| **Resources** |  |  |  |
| LRD Employment Law book(12) | £300 |  |  |
| Case worker 'Kit' folder paper pen (12) | £120 |  |  |
| Mentor/Mentee 'kit' (12) | £120 |  |  |
| **Total for resources** |  |  | **£540** |
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| **Lifelong Learning** |  |  |  |
| Learning at Work Day event | £250 |  |  |
| Travelling for (10) places on Saturday learning club events | £250 |  |  |
| Women's Lives for (15) branch/employer partnership | £150 |  |  |
| Taster for (10) Polish workers in Laundry – Conversational English | £150 |  |  |
| iPad as prize for branch 'best' learner award | £350 |  |  |
| **Total for Lifelong Learning** |  |  | **£1,150** |
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| **GRAND TOTAL** |  |  | **£5,290** |

Developing and Supporting Activists

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|  | 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.  Developing and supporting Activists - A Guide for Branches has lots of ideas on supporting reps to get to grips with their role and get active in their workplace. Order copies or download it from the online catalogue (stock number 2883) <https://shop.unison.site/product-category/organising-for-learning>  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 organize to develop a branch training and development plan |

**Trained & Active Plans (TAP)**

Trained & Active plans are a useful tool to keep a record of suggested tasks and actions for workplace reps, activists, and contacts. Whether you plan to co-ordinate a system for developing and supporting reps in your branch or work directly with them yourself, the Trained and Active plans will help to structure meetings and maintain a record of what was discussed so you can follow up on progress.

You can order copies from the online catalogue or can download printable and editable formats: <https://learning.unison.org.uk/supporting-learning/trained-and-active/>

Trained & Active: Developing & Supporting **Activists** (stock number 4046)

Trained & Active: Developing & Supporting **Reps** (stock number 4048)

Trained & Active: Developing and supporting Workplace **Contacts** (stock number 4047)

Training for activists

**Which courses should activists take first?**

All reps should 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.

**Stewards training**Newly elected workplace stewards are sent a link inviting them to complete the New Stewards e-note - this is basic introductory training in which covers:

* Learning about the role of the steward in UNISON
* Getting signed up to training
* Thinking about their first steps in the role

Reps should then sign up for the new stewards’ course as soon as they can. The course has been designed to cater for newly elected and less experienced UNISON stewards. The course is divided into stage 1 and stage 2.

Stage 1 of a steward’s initial training will help equip them with organising skills and understanding the role of an organising union. It will enable them 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
* Plan their next steps in UNISON

For those who would like to go on to develop their representation skills, Stage  2 of the stewards’ training covers how to:

* Identify what is and isn’t a case
* Understand available resources to help representation
* Interview witnesses
* Prepare for a grievance and a disciplinary case
* Build confidence in representation

Once a workplace rep has completed stage 1 and stage 2 of the new stewards’ course, they will be given ERA (Employment Relations Act) certified steward status. You will be able to find out from your branch WARMS records who needs to complete basic training to achieve ERA certification status and who needs refresher training.

**ERA Refresher training**

All stewards and activists who undertake representation work and handle cases in the branch, must undertake appropriate refresher training at least every five years. You can find out from your regional education team which courses are offered as refresher training in your region.

**Health & Safety Reps**

The essential course for new health and safety representatives is **Organising for Health and Safety**. It covers health and safety legislation, the law relating to risk assessment, and the employer’s responsibilities. There are follow on courses on topics including stress, bullying and sickness absence.

**Union Learning Reps**

The core course for new union learning representatives explains UNISON’s approach to lifelong learning and helping working people to gain skills and qualifications and learn for personal development and fulfilment.

**Branch Officers**

There is specific training and resources to support each of the branch officer roles is available – contact your regional education team for more information.

**Finding out more about training**

* **UTrain:** Reps need a range of skills and knowledge to do their job and the U-train map shows you the training routes available to develop those skills and knowledge: <https://learning.unison.org.uk/activist-training/u-train>
* **Your Regional Education programme:** every region publishes an education programme each year giving details of training offered across the region. To find out what is available in your region contact your regional education team.
* **National Programme**: some activist courses are organised from UNISON Centre; for details go to: <https://learning.unison.org.uk/activist-training/>
* **Online Courses**: our e-learning site hosts online learning modules and   
  e-notes for UNISON members and activists: <https://e-learning.unison.org.uk/>

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

**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

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| A range of short workshops has been developed for delivery in branches to help with organising and engaging members. They vary in length from an 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://learning.unison.org.uk/content/uploads/sites/50/2021/06/LAOS-Workshops-leaflet-June-2021.pdf> 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 team.

Activists – Time Off for Training

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|  | 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

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| **UNISON’s Member Learning Offer**  UNISON offers short online “taster” workshops to introduce members to UNISON learning. These include:  **Your skills, your future**: identifying and developing your skills, increasing confidence, and celebrating your successes |  |
| **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:** feelings about applying for jobs, confidence about work and personal life, identifying strengths and skills, exploring the job application process, increasing confidence in demonstrating skills and experience on application forms, writing the Person Specification |

To find out more contact Learning and Organising Services - [learningandorganising@unison.co.uk](mailto:learningandorganising@unison.co.uk)

UNISON also offers a wide range of personal development and professional CPD courses to members. These are offered nationally, by regional education teams or within branches.

Visit the LAOS member learning webpage for information about the current national offer: <https://learning.unison.org.uk/member-learning/>

Information on member learning local to you can be obtained from your regional education team.

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 contact Learning and Organising Services - [learningandorganising@unison.co.uk](mailto:learningandorganising@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 are 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://learning.unison.org.uk/financial-support>

Model forms

You may like to copy the checklists and forms on the next few pages to help with planning and also maintaining training records in your branch.

Planning and Running a Branch Education Event

There are many practical issues to consider when you’re putting a learning event in place. Whether you’re planning a learning stall, an online learning session, a short lunch and learn activity, a one-day workshop, or a longer course this checklist goes through key things to consider.

**Interest / Need**

*Who is it for? Why is it needed? What do we want to achieve?*

Before you organise anything big, you should find out if people are actually interested in attending! You should be able to get a good idea from responses to learning surveys or requests for learning.

**Agreements**

Do you need to gain agreement or approval before the activity can go ahead? You might need to seek permission from management, or, if you’re applying for external funding, there may be an approval process.

**Timing**

* When will it be held?
* How long will the activity / course / last?
* What will your start and finish times be?
* How much time to do you need to plan and prepare for the event?

**Online or face to face**

There are different strengths and weaknesses to training events run online or face to face, and you should consider carefully which is more appropriate for the session you want to run. The current Covid-19 situation and restrictions in your area should also play a part in your decision.

Also bear in mind that a course with more than one session could be run as a hybrid, with some face to face sessions and the rest online.

**Online events – things to consider**

* What platform will you use?
* Will participants need to download any extra software?
* Does the employer’s IT policy place any restrictions on the software that you can use?
* Do you, the tutor, and any guest speakers know how to use the platform?
* Can you provide accessibility features, such as subtitles?

**Face to face events – things to consider**

* What venue will you use and how suitable is it? Consider location, safety, transport connections
* Is it accessible? Think about step-free access, lifts, accessible toilets, etc.
* How many rooms will you need and what size?
* How will the rooms be laid out?
* What equipment is needed and will this be provided? (e.g. wi-fi, flipcharts, laptop, and projector)
* Are heating, lighting, and ventilation adequate?
* What arrangements will you make for refreshments and meals?
* How much will it cost? (check cancellation fees, and support/security)

**Face to face events – Covid-19 Safety**

The following list of is not exhaustive, you may need to add more specific measures depending on the course or location.

At the start of every session the tutor should run through these points as part of housekeeping and emphasise what is expected of members.

* Learners should have allocated seats in the training room and must use the same seats and tables throughout the session. Moving around the room / building should be discouraged.
* Where course materials will be used, consider providing learners with individual packs to avoid sharing of paper or other materials.
* Wipes and sanitisers should be provided and used regularly.
* Sharing of pens, stationery, and other resources should be avoided. During group work with e.g. flip chart paper one group member should be nominated as a scribe.
* Where possible there should be separate clearly marked entrance and exit doors.
* Instruct members to adhere to the signs that will indicate where the nearest facilities are (toilets, rest room, drinking points etc.)
* The air conditioning should be left on or a window open throughout the session to promote air circulation.
* Where lunch or other refreshments are to be provided, consider carefully how best to do this to minimise contact between learners. Tutors should give members clear directions on how to access the catering and where to eat. Unnecessary mingling should be avoided.

**Who will be involved in leading or running the course?**

* Someone from within the branch? A lay tutor? A member of UNISON staff? Someone from an external provider?
* Will there be any costs involved and how will they be funded?

**Materials**

Do you have the materials you need, or will they need to be ordered or created? These will depend on the activity or workshop but might include:

* learning survey
* leaflets and flyers
* course-books or handouts
* participant packs/folders
* paper and pens
* post-it notes & blu tack
* name badges/cards
* UNISON membership forms
* UNISON ‘freebies’
* evaluation forms

If your event is online, you might need to consider posting out hard copies of materials or uploading documents to a site where learners can access them.

**Attendees and applications**

* agree number of attendees (minimum and maximum) and who to invite
* can they be released from work or will they have to attend in their own time?
* decide the application process (email/online form/paper; members only; how to deal with oversubscription)
* set a deadline for receiving applications
* ask for dietary and access requirements
* send joining instructions with travel directions or advice on how to log in
* prepare packs/handouts for participants
* produce an attendance list and keep a register of attendees (including levels achieved if applicable)
* collect evaluation forms

**Publicity / Promotion**

When is the best time to start recruiting to your event? Which method(s) will best engage your target group? For example:

* posters on notice boards
* website
* leaflets
* personal contact
* branch newsletter
* email
* employer intranet
* social media

Remember to include the date, times and location plus contact details and UNISON logo!

**During the event**

* take photographs (remember permission forms)
* get quotes from participants

**After the event**

* write a press release or article
* share photos and quotes on social media (only with permission!)
* write a report for the branch and employer

**UNISON presence**

Even if an external person is running the activity/workshop/course, make sure someone from UNISON can attend to:

* welcome people
* make sure people know UNISON has arranged the activity
* talk about the union and other learning opportunities
* congratulate people on completing the activity
* look out for recruitment and organising opportunities including talent spotting potential activists

**Funding**

How are you going to pay for this activity? Speak to the branch about using branch funds. Or your region may be able to support learning activities. Additional funding is available from a number of sources but may only pay for certain items.

**Choosing and working with a provider**

Working with external tutors and providers can allow you to offer training on subjects that are outside your expertise and that of your branch and regional colleagues. But there are a few things you should clarify with them before you agree that they’ll deliver an event for you:

* data sharing agreements
* provision of materials
* evaluation
* aims and objectives of learners
* equalities
* minimum and maximum numbers
* cost and payment arrangement

Logo, company name

Description automatically generated

**LEARNING NEEDS QUESTIONNAIRE**

Dear colleague – *(Use this space to explain where the survey has come from, i.e., UNISON working with the employer; and why you are asking for their input)*

Please complete as much or as little of the survey as you would like to.

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| **How would you like to learn?** (tick as many as apply) | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Face to face in a classroom environment | | | | | | | | | |  | | | Distance self-led learning (e.g. Open University or Skills Academy online) | | | | | | | | | | | | | |
|  | Online tutor led sessions | | | | | | | | | |  | | | Face to face in an informal environment | | | | | | | | | | | | | |
| Other (please give details) | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
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| **Why are you interesting in learning currently?** (tick as many as apply) | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | For enjoyment | | | | | | | | | |  | | | To gain new skills | | | | | | | | | | | | | |
|  | To increase your confidence | | | | | | | | | |  | | | To achieve a qualification | | | | | | | | | | | | | |
|  | To develop your career | | | | | | | | | |  | | | Personal development | | | | | | | | | | | | | |
|  | To be able to help my children or grandchildren with their homework | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Other (please give details) | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
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| **What kinds of courses are you interested in?** Please list any skills you would like to develop e.g. computer skills; literacy & numeracy; role specific skills such as report writing. Include any professional development you would like to undertake or personal development or hobby/leisure courses you’re interested in. | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **How confident are you with everyday maths (numeracy) skills?** | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Very confident |  | | Fairly confident | | | | |  | | | A bit unsure | | | | |  | | | | Not confident at all | | | | | |
| **How confident are you with everyday maths (numeracy) skills?** | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Very confident |  | | Fairly confident | | | | |  | | | A bit unsure | | | | |  | | | | Not confident at all | | | | | |
| **How confident are you with computer or IT skills?** | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Very confident |  | | Fairly confident | | | | |  | | | A bit unsure | | | | |  | | | | Not confident at all | | | | | |
| **What’s the best time of day for you to study?** (tick as many as apply) | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | 8am -10am | |  | | 10am – 12pm | | | | |  | | | 12pm – 2pm | | | | | | |  | | | 12pm – 2pm | | |
|  | 4pm – 6pm | |  | | 6pm – 8pm | | | | |  | | | 8pm – 10pm | | | | | | |  | | | 8pm – 10pm | | |
| Which days of the week are better for you? | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **Are there any issues that might prevent you from learning?** (tick as many as apply) | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | Lack of spare time | | | | | |  | Lack of confidence | | | | | | | |  | | Lack of interest | | | | | | | |
|  | It’s not relevant to me | | | | | |  | Age | | | | | | | |  | | Fear of exams | | | | | | | |
|  | Childcare commitments | | | | | |  | Adult dependent care commitments | | | | | | | |  | | Changing/unpredictable shift patterns | | | | | | | |
| Other (please give details) | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **Are you studying or learning anything at the moment?** | | | | | | | | | | | | | | | | | | |  | | | **Yes** | |  | **No** |
| If yes, please tell us what you’re studying and where/how: | | | | | | | | | | | | | | |  | | | | | | | | | | |
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| **Please let us know if you have any other comments or requests:** | | | | | | | | | | | | | | | | | | | | | | | | | |
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**Thank you for completing this survey. Please return your form to** *name/contact details/location of BEC*

**Please give us your name and contact details below so we can stay in touch and let you know about upcoming UNISON learning opportunities**

|  |  |
| --- | --- |
| Name: | Workplace/department: |
| How can we contact you? (please give details): | |
| **Data Protection Declaration:**  Learner information and learning preferences are collected by UNISON in order to make you aware of learning opportunities and to ensure that we can target what we’re offering to your needs.  The information will not be used for any other purpose and will not be shared with any third parties. | |

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| **Branch: Activist Training Record Form** | | | | | | |
| **Last Name** | | **First Name** | | **Membership Number** | | |
| **WORK Telephone** | | **HOME Telephone** | | **MOBILE** | | |
| **Email** | | | | | | |
| **UNISON Post(s) currently held** | | | | | | **Date Started** |
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| **Where (s)he has requested mentoring, name of buddy/mentor:** | | | | | | |
| **Where (s)he is buddying/mentoring another rep, name of that rep:** | | | | | | |
| **Course and dates** | **Date Authorised** | | **Time Off Check** | | **Attendance Check** | **Follow up** |
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To be completed by the participant on the final course day and signed by the tutor

**UNISON Course Attendance certificate**



|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name: | |  | | | | | | | |
| UNISON Branch: | | | |  | | | | | |
| I am employed by: | | | | |  | | | | |
|  | | | | | | | | | |
| I have attended the course: | | | | | | |  | | |
|  | | | | | | | | | |
| On date(s): | | |  | | | | |  | |
| 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 to send a copy to your Branch Education Co-ordinator to maintain the record of your training history*