Appendix A

**UNISON**

**Scheme for the Accreditation and Training of Unison Stewards/Workplace Reps**

1. **INTRODUCTION**

This scheme amends and updates the scheme approved by the National Executive Council in February 2001.

The scheme aims to ensure that UNISON members experience the required standards of representation and that all UNISON stewards are offered appropriate training and development opportunities to maintain and develop their skills. The scheme makes provision for the ongoing ERA certification of stewards who have undertaken refresher or other appropriate training and development within a five year period and sets out the process if this is not fulfilled.

The scheme takes effect immediately. The time limit of 5 years for undertaking refresher training or its equivalent, as set out in the scheme, is effective from 1st January 2010 for all stewards currently ERA certificated and for all other stewards from the date of completing introductory training (as set out in this scheme).

1. **THE LEGAL POSITION**

The Trade Union and Labour Relations (Consolidation) Act 1992 makes provision for trades unions to elect officials in workplaces to act as representatives of the union. The Act, in conjunction with the ACAS Code, requires the employer to give reasonable time off to these trade union officials to carry out duties which are concerned with industrial relations, and to undergo training in aspects of industrial relations. UNISON identifies officials accredited under the 1992 Act as stewards.

Additionally, the Employment Relations Act 1999 gives employees the right to be accompanied at grievance and disciplinary hearings by:

“an official of a trade union (within that meaning) whom the union has reasonably certified in writing as having experience of, or as having received training in, acting as a worker’s companion at disciplinary or grievance hearings” Employment Relations Act 1999 Sec 10 (3).

Trade union representatives are statutorily entitled to take a reasonable amount of paid time off to accompany a worker at a disciplinary or grievance hearing so long as they have been certified by their union as being capable of acting as a worker’s companion.

1. **SCHEME OBJECTIVES**

The objectives of the scheme are underpinned by UNISON’s commitment to supporting stewards/workplace representatives in their development as agreed by National Delegate Conference, 2009 and 2016 ***and 2022:***

1. UNISON values the contribution of every workplace representative. The union is committed to providing development opportunities to enable stewards/workplace representatives to fulfil the role effectively.
2. This includes a named development contact who can guide stewards/workplace representatives towards training and development opportunities related to their role.
3. Branches (usually the branch education coordinator) and regions have a responsibility to support, encourage and signpost stewards to enable them to access and undertake training throughout their career to maintain and develop their skills and knowledge.
4. UNISON asks stewards/workplace representatives to be pro-active in finding ways to put into practice the new skills and knowledge developed on training courses and in development opportunities such as shadowing and mentoring.

**Steps to achieve the Scheme Objectives**

1. To establish a procedure for supporting branches in the accreditation and training of stewards under TULR Act and to provide a system by which representatives can be certified by UNISON as being capable of acting as a worker’s companion within the terms of the Employment Relations Act.
2. To establish a “Trained and Active” process within which stewards are encouraged to take responsibility for their own learning and development and are supported in doing so by the branch (normally the branch education coordinator) and the region
3. To ensure that all stewards are afforded the right to receive training to an agreed minimum standard, and that all are offered further and refresher training on a regular basis
4. To ensure that accreditation and training is in accordance with our overall approach of encouraging and enabling members to come forward as stewards so that the organisation can expand and strengthen
5. To meet the requirements of the Employment Relations Act (1999) by requiring newly elected stewards to attend basic training before certificating them under ERA.
6. To ensure the ongoing training and development of reps by requiring all reps to undergo refresher training after a maximum period of 5 years.
7. To meet the needs of our members and promote a proper standard of representation for members in grievance and disciplinary meetings.
8. **MAIN ELEMENTS OF THE SCHEME**

**New Stewards/Workplace Reps**

1. All will be elected in accordance with UNISON rules and recorded on RMS (code 9) so that they can be issued with credentials, provided with a handbook and Representation Guide, and placed on standard mailing lists. These reps will be known as UNISON accredited representatives under TULRA.
2. Within 3 months of notification of election being sent to the region all new stewards will be invited to complete UNISON’s new steward e-note or be sent appropriate information explaining the role and responsibilities of a steward and actively encouraged to attend UNISON’s New Stewards Stage 1 course.
3. New stewards should be actively encouraged by the branch education coordinator and the region to attend the Stage 1 and 2 New Stewards course as soon as possible after appointment but in any event, they are required to attend within one year of appointment. The branch education coordinator / region should establish if there are reasons why the steward has been unable to attend training, if there are no valid reasons then the steward will be converted to a contact.
4. Other UNISON representatives, including health and safety reps, union learning reps and equality reps are also required to attend the appropriate induction training for their role within one year of appointment.
5. In order to gain ERA certification all newly elected UNISON stewards/workplace reps are required to attend the classroom based or to complete the blended or online versions of UNISON’s New Steward Stage 1 and Stage 2 courses.
6. Stewards who complete the TUC online New Stewards course must provide the digital evidence to their branch and region that they have completed the online course in order for ERA certification to be approved by the region.
7. All newly elected stewards/workplace reps will be provided with a named contact within their branch to support them in their development
8. All new stewards will be accredited under ERA as being able to accompany members at grievance and disciplinary hearings with any employer once they have attended the New Stewards Stage 2 course.

**Existing Stewards and maintaining ERA Certification:**

1. All stewards will stand for annual election in accordance with UNISON rules and be recorded on RMS as being re-elected
2. All stewards will be offered regular training and development opportunities and actively encouraged by their branch (usually the branch education coordinator) and the region to attend the suite of training set out in UNISON Utrain.
3. To ensure continued quality of representation and to maintain ERA certification, stewards/workplace reps are required to:

* complete the ERA refresher or equivalent course, whether face-to-face or blended or online, at least every 5 years

Or

* have evidence of appropriate training and development which is recorded by the Region on the AMT system within the 5 year period.

1. Stewards/workplace reps who do not undertake the ERA refresher and do not have evidence of appropriate training and development which is recorded by the Region on the AMT system, within the five year period, will no longer be ERA certificated. They will, however, continue to be recognised as stewards under the terms of The Trade Union and Labour Relations (Consolidation) Act 1992. For the purposes of this scheme this will be recorded on the RMS as a code 11, the status of a steward that has completed UNISON’s stage 1 only.
2. The five year period for all stewards/workplace reps who are ERA certificated at the introduction of this scheme starts from 1st January 2010.
3. The five year period for all stewards elected since 1st January 2010 starts from the date of completion of the Organising Steward induction training (predecessor to the Stage 1 and 2), OR completion of the Stage 1 and 2 courses, OR completion of the ERA Refresher course.
4. **MAINTENANCE OF THE SCHEME**

The responsibility for implementing and maintaining this scheme lies with regions, although discussions will need to take place with branches through the joint regional/branch assessment process.

Branches are responsible for:

1. keeping regions informed of newly elected and re-elected stewards.
2. providing new stewards/reps with a named contact
3. supporting all new stewards to attend the New Stewards Stage 1 and 2 courses within the timescales
4. support and encourage all stewards to participate in on-going training and development
5. **AGREED MINIMUM STANDARDS OF TRAINING**
6. The agreed minimum standard for ERA certification under the scheme is basic steward’s training which is:

the UNISON New Stewards’ Stage 1 and Stage 2 or

the Unionlearn online new stewards’ course

Stewards will be encouraged to attend UNISON Utrain advanced skills and other skills training courses organised at regional level.

b) UNISON recognises that it has a duty to ensure that activists are trained and equipped to recognise workplace discrimination and harassment and have the confidence to challenge it. Therefore, all UNISON reps are required to

(i) Attend equality training within two years of completing their induction training.

(ii) Those UNISON representatives and branch officers who undertake representation and negotiation should attend the Challenging Racism in the Workplace course and other appropriate equality training, such as UNISON’s advanced employment equality law courses, within three years of appointment***.***

Branches will be able to organise their own courses, provided that:

* + - * tutors are approved trainers accredited either through the UNISON tutor training scheme or by Unionlearn or the WEA;
      * the materials are approved by regions as meeting the agreed standards
      * attendance at training is reported to the region so that the region can record the members’ training on the Activist and Member Training (AMT) system.

c) The agreed minimum standard for the continuing ERA certification of existing stewards/workplace reps within a five year period is:

the UNISON ERA Refresher Course

**Or**

evidence of appropriate on-going training and development related to representation during a 5 year period.

For the purposes of this scheme appropriate on-going training and development will include training provided by UNISON or Unionlearn on the following:

* Employment Law training – covering dismissal, contract law and redundancy
  + - Attendance at the advanced skills training courses as set out in UNISON Utrain, notably, having completed:
      * Advanced Dealing with Grievances and Disciplinary training
      * Negotiating Skills training with representation element

*UNISON Development and Organisation Committee*

*The scheme will be reviewed annually by the Development and Organisation Committee to monitor progress and implementation.*

*Amended and agreed May 2010*

*Updated September 2017 to reflect new Stage 1 and Stage 2 Stewards course*

*Updated and agreed January 2018 to reflect timescales, role BECs – see D and O report Jan 2018.*

*Updated and agreed Sept 2022 – to reflect motion 12, Combatting the rise of discrimination and harassment through education was passed at the 2022 NDC – changed timescales and introduced additional training requirements for stewards and all activists – see D and O report Sept 2022.*

*UNISON Development and Organisation Committee*