



Branch officer roles

There are three types of roles that each Unison branch has: officers (with a remit for over the whole branch); stewards (their remit is primarily over their local departments); and workplace contacts (if you don't want to take on committee responsibilities, but can offer help when necessary). Please don't be put off by the long list of responsibilities – as a committee, we support one another and often share tasks among ourselves. Even if you don't have experience in a particular area, but are interested in learning and excelling in order to support Unison members, you can undertake training, shadow current committee members, and attend meetings with the wider Unison network. The roles are often 'learnt' on the job – wisdom comes with practice! 😊

The UNISON rule book requires that each branch shall elect, annually, the following core branch officers:

- branch chairperson
- equality co-ordinator
- welfare officer
- branch secretary
- health and safety officer
- Labour Link officer (elected by APF payers).
- treasurer
- communications officer
- education co-ordinator
- membership officer
- lifelong learning co-ordinator
- international officer
- young members officer

Branches are also entitled to elect other branch officers to assist with the work of the branch in accordance with the rules. This may include a branch women's officer, Black members' officer, LGBT officer, disabled members' officer. Branches may also wish to create branch officer posts to lead on recruitment, publicity, and/or social activities. Such positions may be directly elected or filled through a process of delegation and work-sharing within the branch committee. To support a sectional structure, branches may appoint "senior" stewards or "convenors" to lead organisation and bargaining at the level of each bargaining unit. Each branch officer post may be shared between two or more members, subject to the approval of the branch. Branches are required to give serious consideration to making use of this facility as an effective means of sharing the workload and involving more members in the work of the branch.

Stewards

The UNISON steward is the fundamental building block of workplace organisation. UNISON is committed to identifying, supporting and training as many members as possible to take on the role of steward or workplace contact. Stewards might be active in different ways and to different degrees depending on their willingness and experience ranging from high-level negotiators to local contacts in the workplace.

Tasks relating to the post of steward:

- to be the first and main point of contact for members with the union
- to recruit new members
- to work with members to establish an organised workplace
- to support and advise members on workplace issues
- to act as a spokesperson for the members they represent and for the branch
- to represent members with the employer, dependent on their experience and confidence
- to represent members within the branch committee
- to be answerable to the members they represent.

Chairperson:

Tasks relating to the office of branch chairperson

- to preside at all meetings of the branch and branch committee
- to agree the agenda for meetings with the secretary
- to ensure that business is properly conducted
- to advise the branch officers and branch committee in respect of matters relating to procedure and interpretation of rules
- to ensure that all functions of the branch are carried out
- to work closely with the secretary to provide leadership to the branch.

Secretary

The branch secretary (rule G4.2) is responsible for ensuring the proper completion of the following tasks. It is not expected that, especially in larger branches, the branch secretary will personally undertake all these functions but will act as the strategic lead officer and co-ordinator within the branch. The secretary will encourage partnership working within the branch committee and the development of new representatives, will be the manager of branch staff and will manage the delegation of work to other branch officers and branch staff as appropriate, whilst providing support and guidance.

Tasks relating to the office of branch secretary:

- to guide the branch's development through the preparation and implementation of a
- branch organisation and development plan
- to ensure the representation of members within the branch in accordance with national guidance (see UNISON guide to representation) and that case forms and applications for services forwarded to UNISON offices are properly completed and authorised

- to provide strategic leadership to the branch committee on implementing campaigning and lobbying activity on branch and wider UNISON objectives, working in liaison especially with the branch Labour Link officer and branch Communications officer
- to convene and attend all meetings of the branch and branch committee.
- to arrange for the minutes of meetings to be kept in a proper manner and circulated to all branch officers and stewards
- to arrange for branch records to be kept in a proper manner
- to ensure the branch, speedily and accurately, processes applications for membership and maintains records in accordance with UNISON's systems
- to ensure regular communication with the members of the branch with news of campaigns, negotiations, issues, branch developments and activities
- to communicate with the union's regional and head offices on behalf of the branch
- to ensure that branch members are aware of opportunities to participate in the activities of the wider union, or within self-organisation if appropriate
- to support, mentor and encourage the stewards in the branch on an individual and collective basis. The branch secretary should seek to meet with each steward on a one-to-one basis, to discuss issues and workplace organisation, on a six-monthly basis
- to ensure that members and stewards are aware, and take advantage, of educational and training opportunities within UNISON
- to ensure that appropriate publicity activities are developed and co-ordinated by the branch
- to act as spokesperson for the branch when in contact with other levels of the union and external organisations
- to ensure that members receive the benefits, rights and services to which they are entitled
- to co-ordinate all branch negotiations and industrial relations matters
- to ensure, in conjunction with the branch committee, that the branch observes the union's rules, supports UNISON campaigns and works towards achieving UNISON's objectives
- to ensure the proper management and direction of any branch employed staff.

Treasurer

Tasks relating to the office of branch treasurer

- to conduct the branch's financial business
- to be the key signatory authorising any item of branch expenditure
- to keep accounts in accordance with the rules
- to provide reports on the financial position of the branch to the branch committee or branch executive committee
- to provide a detailed financial report for the annual branch meeting(s)
- to advise the branch officers and branch committee in respect of matters relating to financial management and appropriate expenditure
- to provide an audited annual return of branch income.

Note. The same person cannot hold both the positions of Treasurer and Branch Secretary.

Education co-ordinator

Tasks relating to the post of branch education co-ordinator:

- to make sure all new stewards and safety representatives receive initial information and guidance about their duties, e.g. stewards handbook, rulebook, service conditions agreements, etc
- to publicise the range of educational and training opportunities available to members and activists
- to get untrained stewards, safety representatives and other branch officers onto appropriate training courses
- to co-ordinate and support the work of learning representatives
- to encourage branch members and activists to make use of the UNISON Open College courses, especially 'Return to Learn' and 'Women, Work and Society'
- to maintain contact with the regional education officer/regional education committee
- to establish a plan of training for activists and to produce an annual budget to meet its costs
- to keep records of what training has been undertaken and by whom within the branch
- to make sure that activists get paid time off for training where appropriate

Lifelong learning co-ordinator

A branch with a number of learning representatives working as a team, led by a co-ordinator, can ensure that learning representatives are accountable and involved in the branch; that learning is high on the branch's agenda and linked into its organising, bargaining and equalities work; and can provide a clear progression route for learning representatives who want to become more involved in other aspects of branch activity.

Tasks relating to the post of branch lifelong learning co-ordinator:

- to work closely with the branch education Co-ordinator (the same person may take on both roles)
- to co-ordinate the activity of learning representatives in the branch education team
- to work with colleagues to recruit new learning representatives
- to be closely involved in negotiating around learning with the employer
- to co-ordinate and disseminate information on learning opportunities in the branch
- to ensure that the work of learning representatives is fully integrated into the branch.

EQUALITY CO-ORDINATOR(S)

All UNISON representatives should promote equality and challenge discrimination in their union role. Equality Co-ordinators, whilst not expected to be an expert on all equality matters, lead and co-ordinate the branch's equality work. The Equality Co-ordinator is not a representative of self-organised groups but is elected by the members at the Annual General meeting. They are however expected to work with representatives of self-organised groups, with equality representatives and all activists. They support the training and development of other union representatives and monitor progress. Branch Equality Co-ordinators should share good practice where there are multiple workplace representatives within branches. Branches can elect equality representatives for each of their work groups. The role of the equality rep is to promote equality and challenge discrimination in their local area, keeping the Branch Equality Co-ordinator updated on developments.

Key tasks for the Equality Co-ordinator include:

- To be the central liaison point for equality in the branch and to distribute information on equality issues;
- To co-ordinate and support the work of UNISON equality reps at branch level;
- To liaise with and support their branch self-organised groups;
- To promote an equality dimension in all the branch's work, including bargaining
- To advise branch officers and the branch committee on proportionality and fair representation, including in branch elections;
- To act as a mentor or buddy to new equality reps and to help them identify their training needs.

Health and safety officer

Tasks relating to the post of health and safety officer:

- to increase the awareness of members, health and safety representatives and branch officers of health and safety issues
- to organise the information held by the branch on health and safety
- to co-ordinate the activity of health and safety representatives and to organise regular meetings of health & safety representatives to exchange information and consider priorities
- to be closely involved in all negotiations with the employer on matters related to health and safety
- to advise the branch committee on health and safety issues arising in the branch and to recommend policies and priorities
- to act as a link between the health and safety representatives and other branch representatives to ensure that health and safety issues are treated as an integral part of the work of the branch
- to maintain contact with the region and regional service groups, for example via the regional health and safety committee.

Communications Officer

Tasks relating to the post of branch communications officer:

- to explain UNISON's policies and to provide the information members need to play an active role in their union
- to assist with efforts to recruit new members
- to help support UNISON's national and regional campaigns
- to help create a positive image for the branch among members, potential members and the public
- to produce news-sheets or bulletins for distribution to branch members.
- to lead on the development of electronic communication with members – email, web, etc
- to routinely and regularly contact convenors and stewards to check for news and to update the branch's website and/or e-bulletins
- to ensure branch communications are in the accessible formats members need – audit for any particular requirements such as large print/Braille etc
- to ensure that nationally and regionally produced publicity and campaign materials are distributed, as appropriate, to stewards and onward to members and non-members
- to monitor local media for stories which affect the branch and take appropriate action
- to help ensure that the branch makes effective contact with the media whenever necessary by:

- creating and maintaining mailing lists to media outlets and contacts
- writing press releases
- ensuring that appropriate individuals within the branch are available for
- comments, interviews, etc
- writing 'letters to the editor'.

Membership officer

Tasks relating to the post of membership officer:

- to map the branch's membership in order to identify membership density and steward coverage
- to monitor the branch's recruitment, and also leavers rate
- to work with the branch committee to develop and implement its organisation and development plan
- to make recommendations to the branch committee on recruitment activities, targets, resources, budgets, etc.

International officer

Tasks relating to the post of international officer:

- to co-ordinate the branch's work on international relations
- to ensure that branch members are informed of national policy on international matters
- to receive and distribute relevant information
- to encourage members to be aware of the importance of international solidarity issues within the context of the overall work of the union
- to liaise where appropriate with regional international structures and to ensure that the views of the branch on international activities are reported appropriately
- to liaise with other branch officers concerning publicity and education on international issues
- to liaise with the solidarity organisations and campaigns that UNISON is affiliated to
- to encourage members of the branch to take action and participate in international solidarity activities organised nationally or regionally
- to ensure that information on branch activity is shared at regional and national level
- to seek to develop an international perspective among members, stewards and branch officers.

Young members' officer

The role of the branch young members' officer is ideal for someone who is interested in becoming more active in the union. The post may be a stepping stone to becoming a steward or taking on wider roles.

Tasks relating to the post of young members' officer:

- to recruit new members and to encourage existing young members to become active in the branch
- to make sure issues of concern to young workers are raised by the branch
- to act as a focal point for all young workers in the branch and workplaces
- to receive and distribute UNISON young members information
- to encourage involvement in UNISON young members campaigns

- to build branch young members organisation and to ensure there are potential new young members' officers in the future.
- Other branch officers will assist in these tasks.

Branch young members' officer must be under 27 years of age for the whole of their term of office

Labour Link officer

The Labour Link officer is elected and accountable to the Labour Link section within the branch and must be an individual member of the Labour Party – this is because the post holder should work to take UNISON policy forward in the party, often being a delegate to the general committee of the party and encouraging joint work and campaigning with the local constituency Labour Party (CLP). The branch UNISON Labour Link officer is the key contact point for information about regional and national UNISON Labour Link matters and is responsible for co-ordinating our activities in the branch. They also represent the interests of Labour Link levy payers on the UNISON branch committee. The Labour Link officer will receive support, training and advice on their role and responsibilities from their regional political officer.

Tasks relating to the post of Labour Link officer:

- to explain and develop the role of the UNISON Labour Link within the branch and ensure that correct procedures are followed regarding the rights of Labour Link levy payers
- to receive correspondence and information on Labour Link matters from national and regional levels and from the Labour Party
- to circulate information to Labour Link members in the branch and convene meetings of members as necessary
- to attend the UNISON branch committee and agree appropriate means of promoting UNISON policy in the party
- to organise elections for branch UNISON Labour Link representation within the regional Labour Link as necessary and ensure reports are made by branch delegates on their activities on behalf of members
- to liaise with the Labour Link regional political officer
- to promote political education and policy discussions
- to strengthen links with local Labour Parties by affiliating to constituencies and electing delegates to attend meetings
- to communicate with Labour Party members within the branch and encourage individual membership of the Labour Party
- to build campaigning work around key issues and co-ordinate campaigns with the Labour Party in council, Westminster, Scotland, Wales and European elections.

Retired members' secretary

The role of the retired members' secretary (rule D6.2) is to enable retired members of the branch to continue to be active in the union through the branch's retired members' section.

Tasks relating to the post of retired members' secretary:

- to ensure that those members approaching retirement have the opportunity to become retired members
- to organise meetings of the branch retired members

- to encourage the participation of retired members in branch activities as appropriate
- to establish links with other retirement organisations in the area
- to attend meetings of the branch committee (rule D6.5)
- to submit a budget to the branch committee to fund retired member activities
- to ensure that the retired members' section functions in accordance with UNISON Rule and any branch standing orders and procedures.

To be a branch retired members' secretary, you must be eligible for retired membership under Rule C2.6.1.

Welfare officer

Tasks relating to the post of branch welfare officer (unison.org.uk/welfare):

- to ensure that branch officers, stewards and workplace representatives, and also employers, have regular up-to date-information about UNISON Welfare and its range of services
- to ensure that members seeking welfare assistance receive a prompt, supportive and effective response
- to liaise and co-ordinate with regional and national levels to ensure that UNISON Welfare support is provided effectively
- to undertake training and seek advice from UNISON Welfare where necessary
- to develop and implement local welfare activity
- to develop links with local charities and sources of support such as Citizen's Advice Bureau and women's refuges

Auditor

The role of the auditor is to act on behalf of the branch's members to ensure probity and that all branch expenditure is underpinned by democratic decisions made in accordance with UNISON rule. A candidate for the post of auditor cannot be a member of the branch committee.

Tasks Relating to the post of branch auditor:

- to oversee the financial records of the branch
- to undertake an annual audit of the branch financial records
- to provide a written report of the annual audit to the annual general meeting
- to report any financial irregularities to UNISON's internal audit department

Workplace contacts

Members who might not be willing to take on the full role of elected steward can play a vital role in ensuring that UNISON has a presence in every workplace. Not an elected position, it can also prove a useful way for a member to gain experience or build confidence before making a further commitment.

Tasks relating to the post of workplace contact:

- to be a point of contact between members and the branch
- to recruit new members or introduce new employees to a branch officer
- to give support to members at work by advising them where to seek assistance

- to keep notice boards up to date
- to distribute information sent by the branch for members.

Learning representatives

Learning representatives are selected by branches and are volunteers who are willing to encourage and support other colleagues with “learning” in the workplace. The branch is responsible for ratifying their appointment and issuing credentials. Their work should be supported by the branch education co-ordinator and the branch lifelong learning co-ordinator. Learning representatives are accountable to the branch and branches should ensure that there are means by which learning representatives can report on activity and participate in the development of the branch through an education network led by the branch education and lifelong learning coordinators.

Tasks relating to the role of learning representative:

- to raise awareness of lifelong learning issues in the workplace
- to offer support and encouragement to learners
- to encourage learners to get involved in the branch
- to work with the branch to promote workplace learning with employers.

EQUALITY REPRESENTATIVES

Equality reps are elected by their workgroup to provide advice and support on equality and discrimination issues in their area. As workplace reps, equality reps talk to members and managers, tackling unfair treatment and ensuring the law and employer’s policies on equality are applied. They may support stewards who are representing members in cases with an equalities aspect. Only reps who are trained and ERA certificated by UNISON should represent members with employers. Equality reps can also advise Branch negotiators on key policy and negotiating issues.

Equality reps liaise with the Branch Equality Co-ordinator who has a branch wide equality role. Equality reps and the Branch equality Co-ordinator all have a valuable role in keeping equalities central to the Branch. Equality reps do not have a statutory right to time off (unless they are also an ERA accredited steward), however some branches have negotiated some paid release to allow equality reps to fulfil their role in the workplace. Equality representatives are encouraged to attend the UNISON training courses organised by UNISON regions.

Note: UNISON Equality reps and/or the UNISON Branch equality Co-ordinator may also be ERA accredited stewards and so take on case work. If not they can provide support to stewards who are accredited but will not be able to take cases themselves.

Health and safety representatives

The role of the health and safety representative may be fulfilled in one of two ways:

- by stewards acting in a dual capacity
- by members who have an interest in health and safety elected to the role.

Where health and safety representatives are not also stewards, branches should ensure that those health and safety representatives are:

- accountable within branch arrangements to those they represent
- have access to local negotiations so that the health and safety implications of any decision are properly considered at an early stage
- trained in dealing with management and members
- valued equally with stewards and other representatives within the branch, and included in the branch committee
- encouraged to work with stewards, branch officers and members.

All safety representatives require regular information on health and safety issues, training, and support from the branch and regional office. Employers and the regional office must be notified in writing of the names of elected health and safety representatives, and of stewards who are also safety representatives.

Branches must:

- notify regional office of all newly elected safety representatives
- arrange for safety representatives to meet together with the branch health and safety officer, and to inform other meetings within the branch and other branch officers and representatives
- establish procedures for raising issues with management
- provide access to appropriate training
- allocate branch resources to the branch health and safety officer and to safety representatives.

Developing and supporting workplace representatives is a crucial role for all UNISON branches. UNISON values the contribution of every workplace representative and is committed to providing development opportunities to enable them to fulfil their roles effectively, including providing them with a named contact to point them in the right direction and support their development. Training is not only essential to enable representatives to do an effective job – it is also a requirement for the legal accreditation of stewards, health and safety reps and learning reps.

Branches benefit greatly from active engagement in learning and education. Attending training provides a great opportunity for sharing ideas and is a morale boost for activists, who bring back new ideas, practical problem-solving techniques and planning tools that can benefit the whole branch. There is much evidence that engagement in lifelong learning also gives a real boost to branch organisation, offering as it does the opportunity to recruit new members and activists from traditionally under-represented groups including women, part time workers and low paid workers. Accordingly, branches should make adequate financial provision to ensure the training of all of its representatives.