

YOUR GUIDE

STARTING YOUR REP

**A REFERENCE RESOURCE WITH
USEFUL INFORMATION TO HELP
TO ASSIST NEWLY ELECTED**



KELLY SHAW

INTRODUCTION

Starting a rep role can feel a little daunting, it can feel like there is a mountain of information and responsibilities you need to become familiar with which can be tough.

This booklet is aimed to be a brief ‘Starter Guide’ to help get you on your way including information on how to set up facilities, how to access information and lists of useful contacts, resources and legislation.

There is a wealth of support available to help you throughout your rep journey and that begins with your other reps so don’t hesitate to reach out!

CONTENTS

Facility Time & Duties.....	3
Booking Rep Training.....	4
Setting Up Unite Email.....	5
Setting Up External LBG Email.....	6
Accessing Membership Info.....	7
Accessing Unite Publications & Material.....	8
Accessing LBG Policies.....	9
Rep Contacts.....	10
Sub-committees.....	11
Useful Legislation.....	12
Useful Websites.....	13

APPENDIX

Activist Email Form.....	15
Expenses Form.....	18
‘Are You Organised?’ Checklist.....	20

YOUR FACILITY TIME & DUTIES



- * Workplace reps are afforded reasonable time to perform union duties. There is no limit but time must be agreed with your line manager,
- * Senior workplace reps are afforded 20% of their working hours.
- * If you sit on the National Company Committee you are afforded 40%.
- * If you are a Health and Safety rep you are permitted reasonable time to perform your duties under UK legislation - there is no definition as to what time amounts to reasonable.

EXAMPLES OF DUTIES: WORKPLACE REP

- Distributing newsletters and Unite literature
- Assisting members with disciplinarys, grievances including accompanying members to formal meetings
- Communicating with members about workplace issues
- Mapping your workplace
- Recruitment
- Getting involved with campaigns and encouraging member participation

EXAMPLES OF DUTIES: H&S REP

- Investigating potential hazards and dangerous occurrences in the workplace and examine the causes of accidents.
- Taking up health and safety issues with the employer.
- Investigate employee complaints regarding health, safety or welfare at work.
- Carrying out regular workplace inspections.
- Attend safety committee meetings.

LEARNING REP

- Raise awareness of learning benefits.
- Support members in learning.
- Provide advice and guidance in learning.
- Encourage workers to take up learning.
- Secure equal opportunities in learning.

EQUALITY REP

- Understanding equality issues
- Developing knowledge on discrimination and the relevant legislation, policies and procedures.
- Helping make Unite workplaces focus on Dignity at Work issues and outlaw bullying.

HOW TO: BOOKING REP TRAINING

You are able to take up to 10 days full paid leave a year to undertake training with Unite.



The exception to this is health and safety training. The law states you must receive reasonable paid time off to undertake health and safety training, this can mean going beyond the 10 day allowance.



<https://unitetheunion.org/why-join/member-services/education/training-and-courses>

Select your region to view the courses available - you can then select the link to apply for a place on the course.

WHEN WILL I FIND OUT IF I'M ACCEPTED?

Typically you will get a letter from your Unite office confirming whether you are on the course. They will include details on where to find the office and information on parking.

WHAT DO I NEED TO BRING?

If it is a 'Module 1' course then you only need to bring yourself. You will be provided with all course material and a pen. You may find it useful to bring your mobile device or tablet (if you have one) for internet use - this will help you complete some of your training activities. If it is not a 'Module 1' course you will need to bring the material from your previous course.

DO WE GET EXPENSES?

You will be reimbursed for travel to and from the training location along with meal expenses (unless the course is ran online). A copy of the expenses form is available on pages 17 and 18.

HOW TO: SETTING UP UNITE EMAIL

As a Unite Rep you will need to engage with members, help with their queries and liaise with other union officials. It is advisable to set up your own unite email address. It gives a professional impression, can be accessed from home and work and can help you communicate with members without using bank systems.



It is important that when sending case related information from a work computer that it is appropriate to be sent externally as well as complying with your employer's data protection, classification and encryption procedures. Failure to appropriately protect sensitive data can result in disciplinary action from your employer. If you are unsure of anything related to this, speak to your NCC or Seconded rep.



Complete the form on pages 14-16 and return it to your regional office.

A letter will be sent to you with your email address and password once the office has set up your account.

WAYS TO ACCESS THE EMAIL PLATFORM

mail.unitetheunion.org

OR

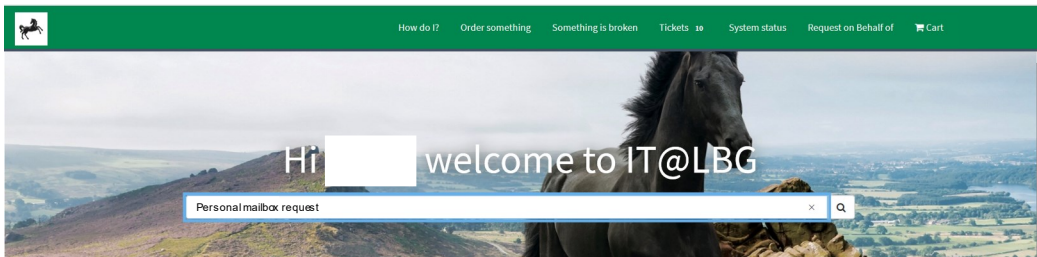
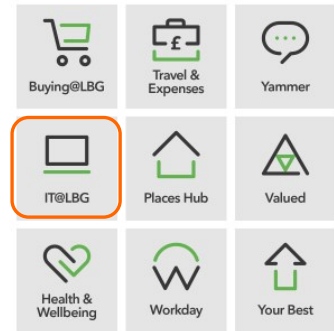
owa.unitetheunion.org

If you cannot access the links from work, visit www.unitetheunion.org, scroll to the bottom of the page and click the link titled 'Outlook Webmail'.

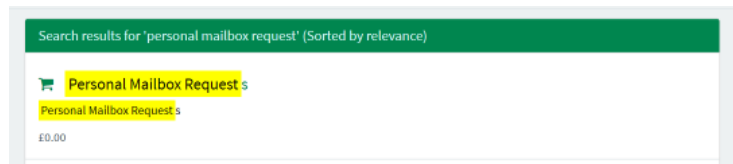
HOW TO: SETTING UP EXTERNAL WORK EMAIL

If you do not already have the ability to send email outside of your organisation, you will need to follow these steps;

- Go to the Intranet Page
- Click on IT@LBG
- Found towards the top right hand side of the page



- Type 'Personal mailbox request' in the Search bar - 'Enter'



- Select the first link
- A form will then populate.

*Requested for

*Phone

*Cost centre

*Please select your Email heritage

*Please select your request type

*Please select your order type

*Please select your SMTP address

*Please confirm you have completed the Information Risk Awareness and Phishing mandatory training in the last 12 months

I confirm

*Please enter business rationale for External Email access

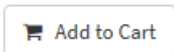
• These should pre-populate

• This is Global unless you are based in the Channel Islands - instead select 'Islands'

• Use the dropdown to find the option relevant to your business area

• "I am a Unite Workplace Rep, I require external email access as part of my role."

• Click



- Now at the top of the page click your Cart.
- You will then need to select 'Checkout' to complete the process.

HOW TO: ACCESSING MEMBERSHIP INFORMATION

Knowing who your members are and whether they are paid up is important and will help you determine your membership density and potentially where you can begin to build your membership.

UNITE STRATUM

Unite have their own database which can be accessed by reps however it will only show you membership data for your own workplace.



Stratum is useful to find the following information;

- ◇ **Current members**
- ◇ **Previous members**
- ◇ **Membership numbers**
- ◇ **Contact information**
- ◇ **Subscription information**
- ◇ **Whether they are fully paid members**
- ◇ **DOB**
- ◇ **Join Date**


To access this system type the following into the address bar and click enter;

workplace.unitetheunion.org

← → ↻ 🏠 🔍 | https://apt.unitetheunion.org/unite-wrap-staff-mobile/workflows/MOBILE.STAFF.MENU | 📄 ☆ 📌 📄 ⋮

Welcome to Stratum...

Stratum is the new membership management solution from APT Solutions, it extends the reach of your membership system to encompass the needs of everyone in the organisation including staff, officers and members.



Username

Password

[Login](#)

Your username and password to access the site will be the same one used to log in to the main Unite site. If you need to reset this or register then you can do that [here](#).

HOW TO: ACCESS UNITE PUBLICATIONS & PROMOTIONAL MATERIAL

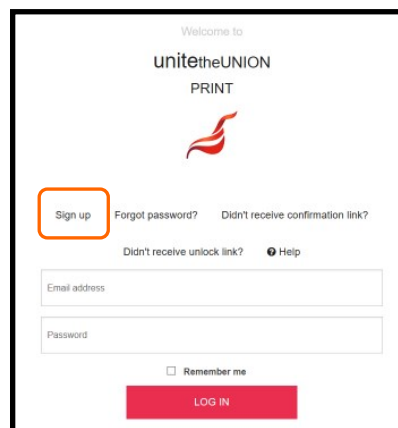
Unite have a number of resource materials you can access yourself online in PDF format. This includes member benefits information, booklets and campaign materials including posters and leaflets.

UNITE PRINT TOOL

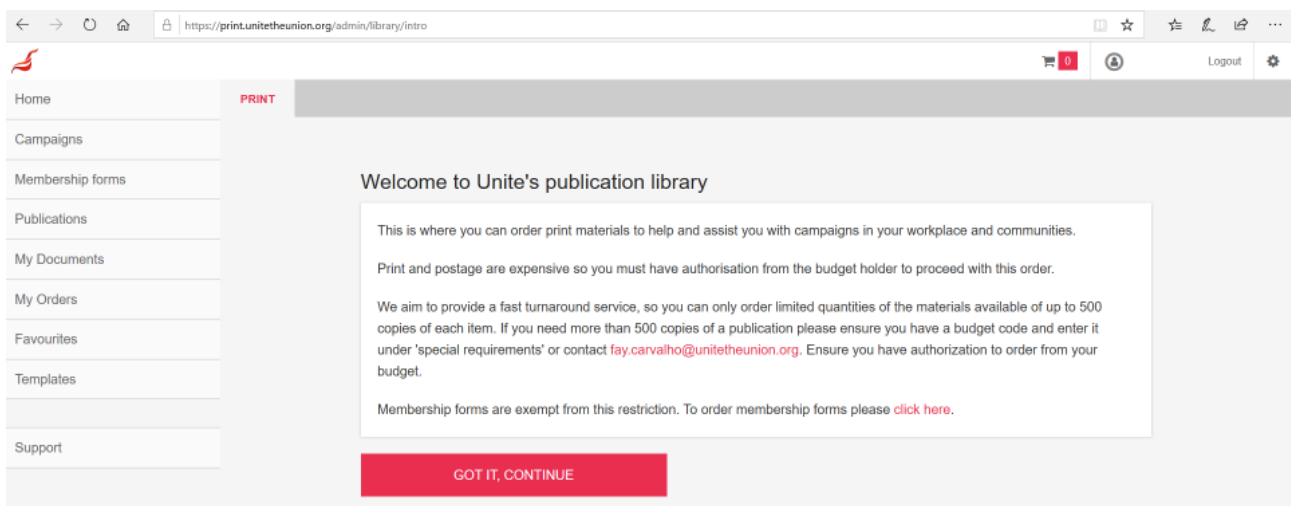
To access this system type the following into the address bar and click enter;

<https://print.uniteunion.org/>

- You will need to have set up your Unite Email address before using this.
- You will need to use the 'Sign Up' link before being able to access the site.



- To make any orders for materials in paper form authorisation is needed with a budget code
- Instead use the option to download PDF versions or speak to your Regional Officer.

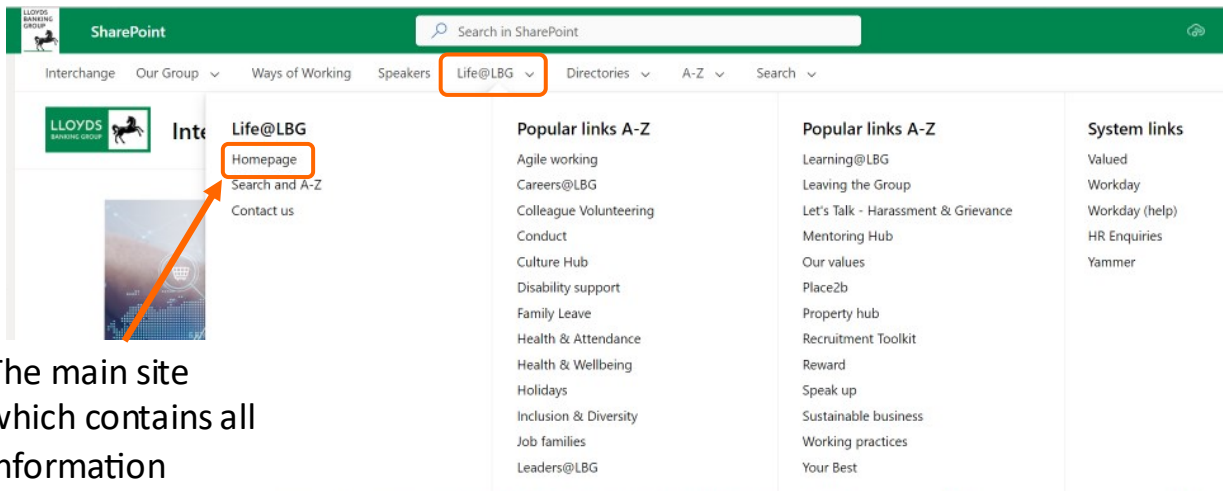


Other ways to get UNITE resource material;

- ◇ Unite the union website - See the Useful Links page
- ◇ Accessing the Unite Workplace Reps Teams site
- ◇ Unite NCC HIVE site
- ◇ Other Reps
- ◇ Make your own!

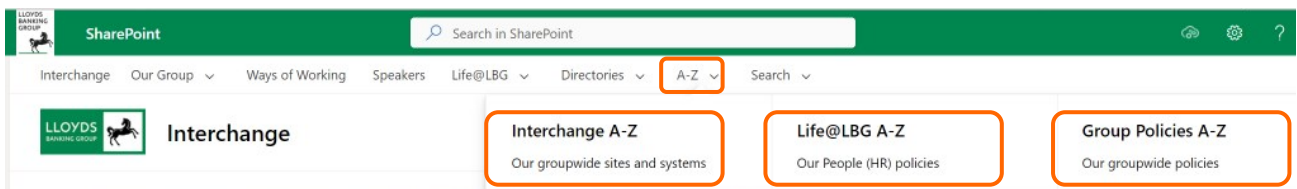
HOW TO: ACCESSING LBG POLICIES

All of the employee policies and procedures can be found via Life@LBG via the intranet.



- The main site which contains all information

Other policies such as Group policies can be found under the A-Z option



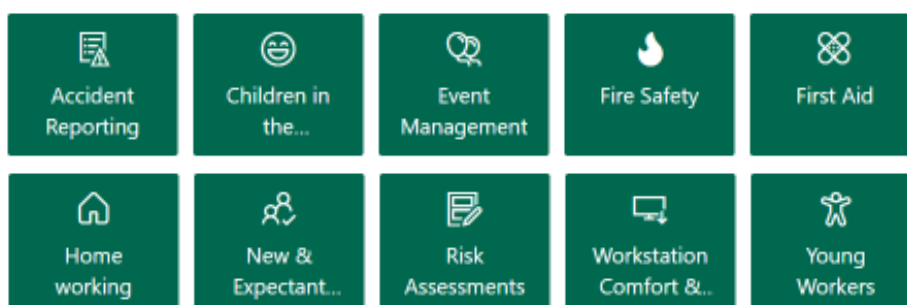
Health & Safety: Policies and Guidance



For health and safety related information, there is a dedicated Health Safety and Fire intranet page.

You can find it by searching for 'Group Health, Safety and Fire & Home'

Top Topics



USEFUL CONTACTS FOR SUPPORT &

SECONDED REPS

Dean Perry	NCC Chair	Dean.Perry@unitetheunion.org
CarolAnne Watson	Scotland	Carolanne.Watson@unitetheunion.org
Susan Monti	Scotland	Susan.Monti@unitetheunion.org
Cris Frost	England & Wales	Cris.Frost@unitetheunion.org
Kelly Shaw	England & Wales	Kelly.Shaw@unitetheunion.org

NCC REPS

Helen Rogers	East Midlands	Helen.Rogers@lloydsbanking.com
Cris Leatham-Frost (until backfill obtained)	London Eastern/ Secoded Rep	Cris.Frost@unitetheunion.org
Chris Wilton	North East	Chris.Wilton@lloydsbanking.com
Mike Cantwell	Northern Ireland	Michael.Cantwell@LloydsBanking.com
Kelly Shaw (until back- fill obtained)	North West/ Secoded Rep	Kelly.Shaw@unitetheunion.org
Rab Baxter	Scotland	RobertBaxter@bankofscotland.com
Richard Byron	South East	Richard.Byron@lloydsbanking.com
James Westall	South West	James.Westall@lloydsbanking.com
Ian Walter	Wales	Ian.Walter@lloydsbanking.com
Karen Jordan	West Midlands	Karen.Jordan@lloydsbanking.com

SENIOR WORKPLACE REPS

Kelly Rowden	East Midlands	kellyrowden@birminghammidshires.co.uk
Susan Ibrahim	London Eastern/ Secoded Rep	Susan.Ibrahim@lloydsbanking.com
Adrian Moore	North East	Adrian.Moore1@lloydsbanking.com
Emily McCartney	Northern Ireland	Emily.Mccartney@lloydsbanking.com
Erin Quinn	North West/ Secoded Rep	Erin.Quinn@lloydsbanking.com
Dale Edington	Scotland	Dale.Edington@lloydsbanking.com
Gillian Bouzaiene	South East	Gillian.Bouzaiene@bankofscotland.co.uk
David Long	South West	David.Long1@lloydsbank.co.uk
Ruth Walter	Wales	Ruth.Walter@lloydsbanking.com
Claire Benton	West Midlands	Claire.Benton@lloydsbanking.com

SUB COMMITTEES

If you have any questions, concerns or would like to raise anything related to one of the areas below please contact the relevant committee members.

Pay & Reward

Lead the negotiations for annual pay increases and reporting back to the NCC/ reps. Also consult and negotiate on any changes to other reward changes such as flex, London allowance, car allowance, job families, overtime, bonus etc.

Dean Perry, James Westall, Kelly Shaw, Cris Leatham-Frost, Ian Walter

Group BAU

Covers groupwide initiatives that don't have their own dedicated meeting. This can include things like; diversity & inclusion, Group Disability, Social Media, HR related changes, and some Health and Safety overviews.

Cris Leatham-Frost, Carolanne Watson, Kelly Shaw, Michael Cantwell

Health & Safety

Discussing health and safety matters including risk assessments and accident numbers as well as health and safety initiatives and procedural changes.

Cris Leatham-Frost, Susan Monti, Rab Baxter, Kelly Shaw, Richard Byron, Karen Jordan

Simplification

The bank's name for redundancy and restructure consultations. This can include organisation changes leading to job losses, preferencing for roles, site/branch closures or redeploying staff.

Michael Cantwell, Ian Walter, Rab Baxter

Policy

Any policy-related changes (from us or the business) come through this forum. Sickness, overtime, disciplinary, leave options, grievance and plenty of others.

James Westall, Carolanne Watson, Karen Jordan, Michael Cantwell, Chris Wilton

Hearing Manager

Regular meetings with the head of the hearing manager pool to discuss union concerns regarding casework, trends and decisions.

Chris Wilton, Carolanne Watson, Susan Monti, James Westall

Retail Network

Meeting with Network leadership to discuss strategic thinking, changes to the network and discuss member concerns.

Rab Baxter, Carolanne Watson, Susan Monti

Consumer Lending

Meeting with Network leadership to discuss strategic thinking, changes to consumer lending and discuss member concerns.

Chris Wilton, Susan Monti, Rab Baxter

CFA

Regular engagement regarding any changes or concerns involving customer financial assistance.

Cris Leatham-Frost, Helen Rogers, James Westall

Job Evaluation Panel

Colleagues responsible for sitting on job evaluation panels to determine the appropriate grading for job roles. Will raise questions over incorrect gradings also.

Carolanne Watson, Kelly Shaw, Dean Perry, James Westall, Cris Leatham-Frost

USEFUL LEGISLATION

EMPLOYMENT LEGISLATION

The Employment Rights Act (1996)	Employment Particulars, Protection of Wages, Protected Disclosures, Protection from Detriment, Parental rights, Unfair Dismissal, Redundancy
The Equality Act (2010)	Protection from unfair treatment connected to protected characteristics, Equality of terms, Pregnancy and Maternity protection, Pay Equality, Reasonable Adjustments
Part-time Workers (Prevention of Less Favourable Treatment) Regulations (2000)	Requires employers to provide employees on part-time contracts with comparable treatment to full-time staff.
The Fixed-term Employees (Prevention of Less Favourable Treatment) Regulations (2002)	Requires employers to provide employees on fixed-term contracts with comparable treatment to full-time staff.
Agency Worker Regulations (2010)	Protection against detriment due to agency worker status. Includes protection to ensure receive correct pay, holidays and safe working conditions.
Transfer of Undertakings (Protection of Employment) Regulations (2006)	Employee protection rights during business transfer.

HEALTH & SAFETY LEGISLATION

The Health and Safety at Work Act (1974)	lays down wide-ranging duties on employers. Employers must protect the 'health, safety and welfare' at work of all their employees, as well as others on their premises, including temps, casual workers, the self-employed, clients, visitors and the general public
The Safety Representatives and Safety Committee Regulations (1977)	Comprehensive guidance detailing the rights held by trade union appointed health and safety reps, including the right to perform inspections, right to time off to perform duties, functions of a safety rep and right to consultation and information;
The Working Time Regulations (1998)	Prevents exploitation of workers' working time, includes; obligation to not enforce employees to work beyond a 48hr week unless employee chooses to opt out, defined minimum rest periods, annual leave entitlements and extra protection for youth workers.
The Management of Health and Safety at Work Regulations (1999)	Risk Assessments, duty to act to mitigate risks, providing health and safety information to employees, operating a written health and safety policy, appointing competent persons to oversee workplace health and safety
The Workplace (Health, Safety and Welfare) Regulations (1992)	Mainly includes facilities information including; maintenance, ventilation, lighting, toilets, workstations, eating and rest facilities etc.
The Health and Safety (Display Screen Equipment) Regulations (1992)	Covers employer duties to; risk assess DSE workstations, reduce risks, ensure a adequate rest breaks, provide regular eyesight tests, provide health and safety information, provide adjustable furniture.

TRADE UNION LEGISLATION

Trade Union and Labour Relations (Consolidation) Act (1992)	Provides protection against detriment to members and reps for engaging in union activity and being part of a trade union. It also covers a wide range of topics relating to trade unions including; the operation of trade unions, accounting and voting procedures
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USEFUL WEBSITES

Site	Address	Useful for
Unite the Union	www.uniteunion.org	Member Benefits and Services > Campaigning and Organising Resources > Unite policies > Unite National Campaigns > Health and Safety Resources > Pension Resources > Equality Resources.
Advisory, Conciliation and Arbitration Service (Acas)	www.acas.org.uk	Guides on procedures employers should follow when dealing with grievances, disciplinaries and other workplace issues > Rep Rights > Employee Rights > Codes of Practice
Worksmart	www.worksmart.org.uk	Workers Rights and Advice.
GOV.UK	www.gov.uk/browse/working	Information around statutory worker's rights.
UK Legislation	www.legislation.gov.uk	Access all statutory UK legislation.
Equality and Human Rights Commission (EHRC)	www.equalityhumanrights.com/en	Resources specifically related to Equality issues.
Citizens Advice Bureau	www.citizensadvice.org.uk/work/problems-at-work	Guidance on Workplace Rights > Dealing with Workplace Issues > Information on Conciliation and Tribunals.
TUC	www.tuc.org.uk	TUC Campaigns > Rep Resources and Guidance > Organising and Campaigning Information > Worker Rights
Health and Safety/ Hazards website	www.hazards.org	Health and Safety News > Resources
Health and Safety Executive	www.hse.org.uk	Comprehensive website related to all things relevant to Health and Safety in the workplace > Guides > Posters > Rep Resources and Checklists
Unite Legal Services	www.unitelegalservices.org	Member Legal Services > Rep Legal Resources > Case Law Updates

APPENDIX



Unite Email Address
Activist Application Form

Unite the Union

Unite House – 128 Theobald's Road – Holborn - London- WC1X 8TW

Tel: 0203 371 2100 - E-mail: ICTHelpdesk@unitetheunion.org

Application form for Unite Email Account

Please complete and sign this form to gain access to a unitetheunion.org email address. Please return it to your regional office for the attention of the Regional IT Coordinator. We will provide details of your account, including user name and password as soon as possible.

IMPORTANT NOTE:

The acceptable use policy applies to all persons using the Unite remote access service and is designed to help protect our service, our members, and the Internet community from irresponsible or illegal activities. Unite expect that common sense and good judgement will guide all of our subscriber's activities on the Internet.

If a Unite Activist account is used to violate the policy, we reserve the right to terminate service without notice. Our preferred course of action would be to advise the account owner of the inappropriate behaviour and corrective action necessary. However, flagrant violations of the policy will result in immediate termination of service.

By completing this form you are agreeing to the security requirements implemented by the ICT department. If an account has not been accessed for a 3 month period we reserve the right to disable or remove the account without any requirement to restore any data if later required. This is to ensure we maintain the security and performance of our systems. Loss of a device configured with access to email, should be reported to your IT contact below.

Acceptable Use Policy

Unite Activist Email accounts may be used only by the authorised owners of the accounts except where specifically authorised by Unite System Administrators. Revealing your password to others or allowing use of your account by others is prohibited.

Unite accounts and services may be used for lawful purposes only. Use of a Unite account or service in an illegal manner is ground for immediate termination of the account. Potentially illegal activities that are prohibited include but are not limited to:

- Unauthorised copying of copyrighted material without the consent of the copyright holder.
- Making fraudulent offers of items, products or services originating from your account.
- Threatening bodily harm or property damage to individuals or groups.
- Accessing material of an offensive or pornographic nature.

The following Email-related actions are prohibited:

- Using an email box exclusively as a storage space for data.
- Attempting to impersonate any person, using forged headers or other identifying information.
- Distribution of malicious software.

The Unite ballot rules and guidelines for the conduct of Union elections state that the Union's general fund resources should not be used to support a particular candidate in an election. Unite considers that this prohibition includes use of the Union's Internet/Intranet and e-mail facilities for campaigning purposes. This account is the sole responsibility of the Branch Secretary/Workplace Rep/Activist, whilst you remain in post this account should be used in-line with the policy stated above and the data protection act, on leaving your role you are required to notify IT so that the account can be transferred to a new member who will assume full responsibility post transfer

I agree to the terms and conditions set out above.

Full Name:	
Membership Number:	
Region / Branch #:	
Position:	
Email Address:	TO BE COMPLETED BY IT
Date:	
Signature:	

PLEASE SEND THIS FORM TO YOUR REGIONAL OFFICE, c/o REGIONAL IT COORDINATOR

15/10/2019

Mass Mailing Guidelines

Please note that emailing or messaging activists is exempt from this policy.

This document covers all forms of electronic communication, where we refer to mass this is where more than 50 members are contacted with the same or very similar message.

It is important to recognise our legal obligations when emailing members:

- **We should always clearly identify who has sent the message and this must be from Unite the Union**
- **There is a legal requirement to comply with any data erasure/deletion or objection requests and to respect members' communication preferences. This means only ever using up-to-date membership data.**

If you receive any data protection requests from members these should be sent to dataprotection@unitetheunion.org and copied to your Regional Legal Officer and IT Co-ordinator.

Mass Emailing and Mass Texting

The following steps should be carried out each and every time a mass communication to members is sent out.

1. Download an up to date list from the membership system (Stratum/Informer/Branch Portal).
2. If you have a list from another source other than the membership system, this will need to be cross-referenced to ensure you are NOT emailing someone who has opted out of receiving such communication and to ensure you are only communicating with Unite members who wish to receive the communication.
3. The revised list can either be provided to an agreed third party (who must be approved by Unite IT/Data Protection) to send out the mailing or alternatively Unite has their own mass mailing system in place, your local IT co-ordinator will be able to assist with this.
4. The content of the email must clearly be identifiable as coming from Unite the Union.
5. Within the content of the message you must allow the member to have an opt out / unsubscribe option. For text messages this option should be in the format of text STOP to 447786200116.
6. Any unsubscribe request must be recorded back in to the membership system (stratum). If the unsubscribe request is from a non-unite member within your own internal mailing list, this must be removed from all future mailings.

If you require assistance please contact your local administrative support, if they are not available please contact your local IT Co-ordinator.

UNITE LAY MEMBER EXPENSE FORM - NATIONAL

IMPORTANT: SEE OVERLEAF FOR INSTRUCTIONS AND GUIDANCE

Your Name:		Membership No:	
Home Address:			Post Code:
(Has address changed since last expenses claim Yes / No)			YES NO
CONFIRM OR UPDATE YOUR BANK DETAILS			
Bank Name:	Account No:		
Account Name:	Sort Code:		

Title of Meeting:	Venue:
Dates of Meeting From:	To:
Date & Time Leaving Home:	Date & Time Returning Home:

Travel Costs					Total Amount
By Car	From Postcode	To Postcode	No. miles	@ 45/25p mile + 5p pm per additional passenger (See over)	
By Rail (2 nd class fare) – Receipted (If warrant used, specify warrant number)					
By Air (only if authorised in advance) - Receipted					
Taxi (only if essential) – Receipted					
Other Travel (Bus / Tube / Parking / Tolls) – Receipted					
Non-Receipted Travel (Please list separately overleaf)					

Daily Allowances	No.	Total Amount
Note – The allowances below can only be claimed if in line with Unite's Lay Members Expense Policy		
5 Hour	£5.00	
10 Hour	£10.00	
15 Hour	£25.00	
Evening Meal (return home after 20.00 and no meal provided by Unite)	£10.00	
Incidental Overnight (UK/ROI/Gibraltar)	£5.00	
Overnight (Other than UK/ROI/Gibraltar)	£50.00	

Overnight Accommodation	No.	Total Amount
Bed & Breakfast cost only – Must be receipted		

Loss of Pay Allowance - (See guidance overleaf – not claimable for Education courses)		
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TOTAL CLAIM	
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Signature of Member:		Date:	
Authorised by Event Organiser:	Name:	Signature:	Date:
Authorised by Regional Administration:	Name:	Signature:	Date:

Form: NatLayExGBP0419

INSTRUCTIONS

Please complete this form in BLOCK CAPITALS in ink. For constitutional meetings, please sign and send to the addresses below. For all other meetings, please ensure that this form is signed (authorised) by the person organising the event you attended, as well as (Central or Regional) Administration and either hand it to them or send it (signed) to the addresses below.

Where to send your form: All members for non-National meetings & conferences - to appropriate Regional Office.

Non-Received Travel				
Date	Type of Travel	To	From	Fare
			Total	

Guidance Notes

Mileage

1. Mileage may only be claimed for the distance driven. Where travel is shared using only one car, only the driver may claim.
2. It is important to declare the starting and destination postcodes.
3. 45p per mile may be claimed for the first 10,000 miles per tax year and 25p per mile thereafter. A further 5p per mile is claimable per additional member transported to the meeting. Tax years are from April 6th to April 5th the following year. Members may wish to maintain a cumulative record of mileage claimed per year.

Please explain complicated car journeys; multiple stops, diversions, road-works, completed routes or any reason why your journey is not from point A to point B and return. List the name and membership number for any passenger transported in member's vehicle.

Loss of Pay

To be eligible for loss of pay, members need to meet the following three criteria:

1. Be in employment.
2. Would have worked on the day(s) claimed for.
3. Have not been given paid release by their employer to attend the Union activity.

It is the accepted practice that member's (with the support, if necessary, of their local union official) will negotiate time off with pay from their employer for Union responsibilities. If the employer will not co-operate, the appropriate Regional Secretary/National Officer must be approached to attempt to resolve the problem.

In the circumstances where this is unsuccessful, loss of pay will be reimbursed as follows:

The Loss of Pay claim is to be calculated based upon actual net basic pay lost (including shift premium but excluding overtime) plus make-up for lost employer pension contributions.

Losses will only be paid upon the production by the member of evidence documenting the loss – e.g., payslip, confirmation from employer, etc. In order to avoid delay in payment, members intending to claim loss of pay should speak to Regional/National Administration in advance so that they clearly understand how the loss will be calculated and what evidence they will be required to produce.

For the avoidance of doubt, at the insistence of HMRC, the former regime where members could claim up to £55.80 per day without producing evidence of loss is rescinded.

Self-employed members are not eligible for Loss of Pay but can claim their gross loss via invoice. Members should consult with Regional/National administrators in advance to be fully advised as to the procedure to be followed.

WRONG CLAIMS

Any member whose claim(s) are subsequently proven to be wrong must re-pay the Union any amounts overpaid and shall, where the claim(s) are found to be fraudulent (a proper investigation having been conducted), the member shall, as appropriate, be subject to disciplinary procedures of the Union. The Union shall likewise pay the member any amounts underpaid.

Form: NatLayExGBP0419

Are you well organised?

Checking your organisation

The reality of your current workplace organising may fall short of the definition of a well organised union group. Use this checklist to assess your current situation. The checklist is designed so that any 'No' answers indicate where you may need some organisational development and will help you discover where your organising priorities may lie.

Use the checklist systematically to assess the strengths and weaknesses of your current organising. Give yourself a point for every 'Yes' answer ('No' answers don't score any points).

When you have finished working through each of the sections add up the points you have scored for each. Compare the points you scored with those on the 'Ready Reckoner' on the back page and identify where your strengths and weaknesses are in terms of your union group's organising.

Workplace Reps and Activists		
Do you know how many Reps you have?	Yes o	No o
Are there enough Reps?	Yes o	No o
Does every member have a Rep?	Yes o	No o
Do you know which Reps represent which members?	Yes o	No o
Is the Reps group representative of the membership? (think not just in terms of jobs/ departments but also of age, gender etc)	Yes o	No o
Do reps regularly take up issues on behalf of members?	Yes o	No o
Are Reps frequently in touch with one another?	Yes o	No o
Have all Reps been on a union training course?	Yes o	No o
Do you have a network of activists who can help the Reps group with organising work?	Yes o	No o
Do Reps encourage members to become active in Unite?	Yes o	No o
Do Reps invite members to take on special jobs for the union group?	Yes o	No o
Do you provide training for activists?	Yes o	No o

Issues in the Workplace		
Do you regularly talk to your members about what issues concern them?	Yes o	No o
Do you regularly talk to non-members about what issues concern them?	Yes o	No o
Do members know what issues you are currently dealing with?	Yes o	No o
Do non-members know what issues you are currently dealing with?	Yes o	No o
Are you campaigning on a major issue at the moment?	Yes o	No o
Do you know what campaigns have been run by Unite, at any level, in the last 12 months?	Yes o	No o

Members		
Do you know how many members you have?	Yes o	No o
Is membership density 80% or more?	Yes o	No o
Do you know where members work, what they do, their age, gender and who their Rep is?	Yes o	No o
Do you know what each of your members' attitude to the union is?	Yes o	No o
Is there a list or database of this information?	Yes o	No o
Does this list/database record any involvement they have had with Unite?	Yes o	No o
Do all of your members know who their Reps is?	Yes o	No o
Do all of your members know how to contact their Rep?	Yes o	No o

Member Involvement		
Do you know what issues members feel strongly about?	Yes o	No o
Is there a network for communicating between members?	Yes o	No o
Do you arrange activities that members can get involved in?	Yes o	No o
Does your workplace group run social events?	Yes o	No o
Do Reps regularly talk to members informally about union matters?	Yes o	No o
Do you hold regular workplace meetings of members?	Yes o	No o
Do you have regular newsletter for members?	Yes o	No o
Are posters displayed promoting Unite?	Yes o	No o
Are there notices posted telling people who the Unite Reps are and how they can be contacted?	Yes o	No o
Do you know what percentage or how many of your members have:		
Attended a union meeting in the past year?	Yes o	No o
Recruited a new member?	Yes o	No o
Been involved in health and safety issues?	Yes o	No o
Been involved in any campaigns?	Yes o	No o
Undertaken any form of union activity?	Yes o	No o

Relations with Management		
Do you have a Recognition Agreement?	Yes o	No o
Does the Recognition Agreement say how many Reps you can have and for what areas or departments?	Yes o	No o
Does the grievance procedure allow Reps to take up issues on behalf of members?	Yes o	No o
Are you formally consulted by management on issues that affect members?	Yes o	No o
Does the consultation procedure allow you to raise issues that you are concerned about?	Yes o	No o
Do line managers respond positively when approached by Reps?	Yes o	No o
Do you have a formal negotiating structures/systems?	Yes o	No o

Recruitment		
Do you know how many non-members there are in your workplace?	Yes o	No o
Do you know where they work, what they do, their age, gender and so on?	Yes o	No o
Is there a list or database of this information?	Yes o	No o
Does this list/database record whether they have been approached to join and what their response was?	Yes o	No o
Does management regularly give you a list of new starters?	Yes o	No o
Is it someone's job to ask the non-members to join Unite?	Yes o	No o
Is it someone's job to ask new starters to join Unite?	Yes o	No o
Do you have special union recruitment material relevant to your workplace?	Yes o	No o
Do you have recruitment targets?	Yes o	No o

Are you well organised?

'Ready Reckoner'

'Ready Reckoner'				
Section	Number of Points Scored			
<i>Workplace Reps & Activists</i>	12	9	6	3
<i>Issues in the Workplace</i>	6	4	3	2
<i>Members</i>	8	6	4	2
<i>Member Involvement</i>	14	11	7	3
<i>Relations with Management</i>	7	5	3	1
<i>Recruitment</i>	9	7	5	3
	<i>Well Organised</i>	<i>Can Still Improve on Organising</i>	<i>Organising is in Danger of Decline</i>	<i>Poorly Organised</i>
Scale of 'Organising Health'				

Adapted from *Organising, A manual for MSF Members*