## Unite the Union

Education Department

**New Reps Induction**

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| Candidates Name: |  | | |
| **Address:** |  | | |
| **Telephone Number:** |  | **Email** |  |
| **Name of Tutor:** |  | | |
| **Date of Course:** |  | | |
| **Course Code:** |  | | |

Workbook

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Version TQUK 2021

**Why do we need a Workbook?**

**This course is accredited through Training Qualifications UK (TQUK). This means you can achieve formal recognition, i.e., credits, for your learning. TQUK is the body that awards these credits and issues certificates. To achieve the award, you need to produce evidence of your learning.**

For each TQUK approved course you complete successfully, you will receive a certificate detailing the unit title (i.e., subjects), the level and number of credits you have been awarded. You can bank your credits, and then use them with credits from other accredited learning to achieve a qualification. You can progress to achieve higher level credits too. You can also use them to prove to an employer, or anyone else, that you have obtained new skills and knowledge.

**What are Credits and Levels?**

Your TQUK certificate will show the value of your achievements and this will appear as credits and levels. The number of credits indicates the quantity of your learning achievements. The Level shows how demanding it was – for example, Level 2is at the same level as NVQ2 or GCSE A-C grades.

**How will my learning be assessed?**

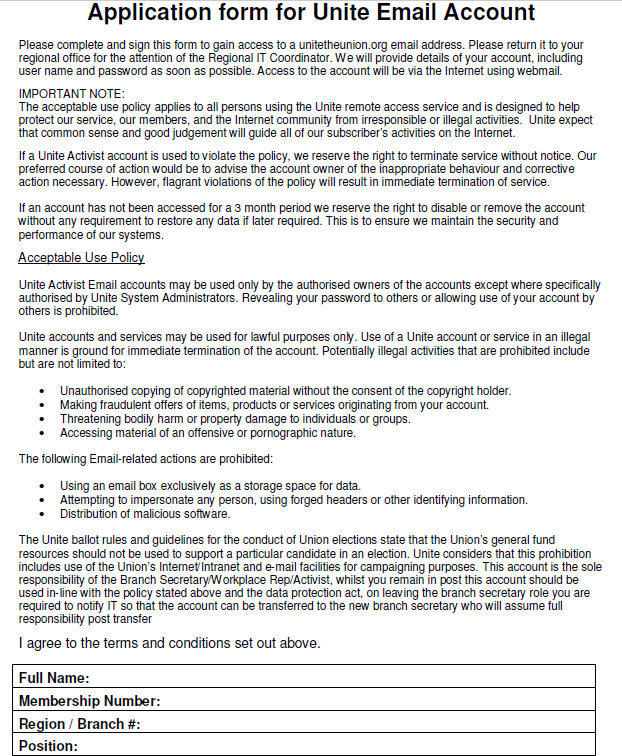
1. You produce evidence of learning during the course through the activities you do.
2. You record this in your workbook or your notes.
3. Your tutor also observes your work and your contributions as an individual or group member.
4. Your tutor 'assesses' this evidence during and at the end of the course and then recommends to TQUK what your award/level of credits should be.
5. If you disagree with your tutor’s assessment, you can appeal to the college.
6. Each term the tutors' recommendations are 'checked' by TQUK’s ‘external moderator’.
7. An external moderator will then confirm to TQUK the number and the level of credits you have achieved.
8. Again, if you disagree with the assessment, you can appeal to TQUK.
9. TQUK issue your certificate.

**Do you qualify?**

Additional Learning Support can provide assistance, adjustments or technology to enable you to study more effectively. Ask your tutor to arrange a confidential discussion with our support staff.

Course declaration

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| **Candidate declaration:**  **I confirm that the evidence listed for these unit is authentic and a true representation of my own work.**  **Candidate name: ……………………………………………………..**  **Candidate signature: ……………..………………………..…………**  **Date: ……………………** |
| **Assessor declaration**:  I confirm that this candidate has achieved all the requirements of this unit with the evidence listed. (Where there is more than one Assessor, the Co-ordinating Assessor for the unit should sign this declaration.)  Assessment was conducted under the specified conditions and context, and is valid, authentic, reliable, current and sufficient (VACSR).  Assessor name: ……………..……………………………………………………………….……  Assessor signature: ………….……..………………………………..……… Date:…………………  Countersignature: (if relevant) ………………………………………..……. Date: …….…….…… |
| **Internal Verifier declaration:**  **This section to be left blank if sampling of this Candidate did not take place.**  I have internally verified the assessment work on this unit in the following ways (please tick):   1. sampling candidate and assessment evidence 2. observation of assessment practice 3. discussion with candidate 4. other – please state:   I confirm that the candidate’s sampled work meets the standards specified for this unit and may be presented for external verification and/or certification.  ⬜ Not sampled  Internal Verifier name: …………………….…………………………………………………………  Internal Verifier signature: …………………….…………………………… Date: ….………….…  Countersignature: (if relevant) ……………………………………………… Date: ……………….. |



**Employment law changes from 6 April 2020**

6 April 2020

New legislation making major changes to existing employment regulations comes into force from Monday 6 April 2020.

Employers and employees can find the updated advice here on Acas’s website. The most significant changes are:

**Parental bereavement leave and pay**

The Parental Bereavement Leave and Pay Act 2018 gives all employed parents the right to 2 weeks' paid leave if their child aged under 18 dies, or if they have a stillbirth at 24 weeks or later.

See our advice on [parental bereavement leave and pay](https://www.acas.org.uk/time-off-for-bereavement/parental-bereavement-leave-pay).

**Written terms (‘written statement of employment particulars’)**

Workers now have the same right as employees to written terms (a ‘written statement of employment particulars’) from their employer.

Employers must provide their workers and employees with their written statement on or before their first day of employment, no matter how long they're employed for.

The written statement must include details about:

* the hours and days of the week the worker or employee is required to work, and whether they may be varied and how
* entitlements to any paid leave
* any other benefits not covered elsewhere in the written statement
* any probationary period
* any training provided by the employer

See our advice on [written terms (the 'written statement')](https://www.acas.org.uk/what-must-be-written-in-an-employment-contract).

**Agency workers' rights**

The Swedish Derogation (referred to as 'pay between assignments' contracts) is abolished from 6 April 2020, so all agency workers are entitled to the same rate of pay as their permanent counterparts after 12 weeks.

All agency workers are entitled to a key information document that clearly sets out the type of contract they will have and the pay they'll receive.

See our new guide on [agency workers](https://www.acas.org.uk/agency-workers).

**ICE (Information and Consultation of Employees) Regulations**

From 6 April 2020, it's been made easier to request an information and consultation agreement. A minimum of 2%, rather than 10% of employees (or at least 15 people), in workplaces with 50 employees or more can request a formal agreement to be informed and consulted about workplace matters.

See our new guides on [ICE (Information and Consultation of Employees) Regulations](https://www.acas.org.uk/informing-and-consulting-employees).

**Changes to holiday pay calculations**

From 6 April 2020, the period used to calculate a week's pay for holiday pay purposes increases from the previous 12 weeks of work to the previous 52 weeks.

**Holiday pay calculator: -**

https://www.acas.org.uk/checking-holiday-entitlement/calculating-holiday-pay

**Development Plan**

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_ Venue: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Tutor:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Describe your own current Workplace Rep skills.** |
| **Describe your own Workplace Rep skills that need to be developed.** |
| **Describe information about other Workplace Rep skills development.** |
| **Describe barriers to your own Workplace Rep skills development** |
| **Describe ways to overcome the barriers outlined previously.** |
| **How will I know I have reached my goal(s) for this Course?** What will I be able to do better, to discuss at the end of the course? |
| **Draw up an action plan for your own Workplace Rep skills development to discuss at the end of the course.** |

**Review date for this plan:** (Suggest 6 months from conclusion of course)

**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UNIT TITLE Roles and responsibilities of the Union Rep** - **2 credits**

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| **LEARNING OUTCOMES**  **The learner should be able to** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
| 1. Understand the roles and functions of the Union Rep. | 1.1 Give reasons why individuals choose to become Union Reps. | Activity 2 | Page 25 |
| * 1. Summarise the three distinct roles of the Union Rep. | Activity 2 | Page 26 |
| 1.3 List the range of functions undertaken by the Union Rep. | Activity 2 | Page 26 |
| 1.4 Explain the role of the ‘specialist rep’ to include reference to:   * Safety Reps * Learning Reps * Equality Reps. | Activity 5  Activity 25  Activity 9 | Pages 37-42  Pages 98-100  Pages 52-54 |
| 1. Know the skills required for a Union Rep to undertake the role effectively. | 2.1 Explain why the following skills are important for the Union Rep:   * note taking * Leadership * Interviewing * Communication * Negotiation * Giving information, advice and guidance * Presentation. | Activity 16    Activity 18  Activity 19  Activity 34  Activity 6 | Pages 74.-75    Pages 80-81  Page 83  Page 116  Pages 43-45 |
| 2.2 State the professional behaviours and values that are important for the Union Rep. | Activity 4 | Pages 33-35 |
| 1. Understand the place of the Union Rep in relation to the rest of the organisation. | 3.1 State who the Union Rep answers and reports to in relation to Union duties. | Activity 4 | Page 33-35 |
| 3.2 Explain how employee/employer relationships co-exist alongside Union Rep duties. | Activity 12 | Pages 64-65 |
| 3.3 Describe where to access help and support when undertaking Union duties. | Activity 4 | Pages 33-35 |
|  | 3.4 Identify other individuals in the union structure who are able to guide and support the Union Rep. | Activity 4 | Pages 33-35 |

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| **4.** Be able to encourage active membership amongst members of Unions. | 4.1 Summarise the case for:   * trade unionism   trade union membership. | Activity 7  Activity 7 | Pages 46-48  Pages 46-48 |
| 4.2 Identify and respond to **reasons** people may give as to why they do not join a union or engage in learning opportunities presented by the union. | Activity 7 | Pages 46-48 |
| 4.3 Identify and respond to reasons current members may give as to why they are dissatisfied with membership. | Activity 7 | Pages 46-48 |
| **4.4** Give examples of recruitment success stories. | Activities 10/19 | Pages 55-60/82 |

**KEY: WS**=Work Sheet **TO/PO**=Tutor/Peer Observation **SS=Summary Sheet** **P**=Plan **O**=Other

**NB** *You do not need to write in more than 2 occasions in the Evidence column e.g. first piece of evidence, best piece of evidence*

# Level achieved \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Signed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Learner \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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|  | **RITS** |
| **Level 2** | F/617/9024 |

**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UNIT TITLE Skills required by the Union Rep - 3 credits**

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| **LEARNING OUTCOMES**  **The learner should** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
| 1. Be able to prepare for and conduct an interview. | 1.1 Explain the purpose of an interview. | Activity 17 | Pages 76-79 |
| 1.2 Prepare for an interview. | Activity 17 | Pages 76-79 |
| 1.3 List things which should and should not be done in order to ensure an effective interview is conducted. | Activity 17 | Pages 76-79 |
| 1.4 Conduct an interview, to include:   * establishing relevant information * generating solutions or a range of options for next steps. | Activity 18 | Page 80 |
| 1. Be able to prepare for and give a presentation. | 2.1 Research a topic for presentation. | Activity 15 | Page 73 |
| 2.2 Deliver a presentation. | Activity 15 | Page 73 |
| 2.3 Evaluate own performance when presenting, identifying areas for improvement. | Activity 15 | Page 73 |
| 1. Be able to act as note-taker in a formal environment. | 3.1 Explain why it is important not to rely on a note-taker provided by the employer in a meeting involving a Union Rep. | Activity 16 | Pages 74-75 |
| 3.2 Explain why it is important to write notes of a meeting up as soon as possible. | Activity 16 | Pages 74-75 |
| 3.3 Take comprehensive notes of a short presentation. | Activity 16 | Pages 74-75 |
| 3.4 Answer questions about content of a presentation using notes. | Activity 16 | Pages 74-75 |
| 1. Be able to give information, advice and guidance relating to union matters. | 4.1 Identify issues on which it would be appropriate for a Union Rep to give information, advice or guidance. | Activity 6 | Pages 43-45 |
| 4.2 Identify who can help a Union Rep give effective information, advice and guidance. | Activity 6 | Pages 43-45 |
| 4.3 Summarise what information, advice and guidance you would give in a specific scenario. | Activity 6 | Pages 43-45 |

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| 5. Understand the importance of leadership skills for Union Reps. | 5.1 Outline traits associated with a successful leader. | Activity 2 | Pages, 25-27 |
| 5.2 Identify why Union Reps should be considered leaders. | Activity 2 | Pages 25-27 |
| 5.3 Identify roles and responsibilities of a leader. | Activity 2 | Pages 25-27 |
| 5.4 Describe how identified roles and responsibilities are delivered by Union Reps in practice. | Activity 12 | Page 64-65 |
| 5.5 Develop an awareness of own leadership style. | Activity 10 | Page 55-60 |
| 6. Select appropriate communication methods. | 6.1 Identify the pros and cons of a variety of methods of communication. | Activities 19/21 | Pages 82 and 87 |
| 6.2 Identify the preferred method of communication for:   * sharing information with members * gathering members views * gathering information on member issues. | Activities 19 /21  Activities 19/21 | Page 82 and 87  Page 82and 87 |
| 7. Prepare for a negotiation. | 7.1 Identify the key points of an identified issue to negotiate on. | Activities 34/35 | Page 116/117 |
| 7.2 Identify the information you will need in order to successfully argue a case. | Activities 34/35 | Page 116/117 |
| 7.3 Identify the goals you wish to achieve through a negotiation. | Activities 34/35 | Page 116/117 |

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# Level achieved \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Signed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Learner \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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|  | **RITS** |
| **Level 2** | J/617/9025 |

**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UNIT TITLE: Legislation and codes of practice relevant to the Union Rep 1 credits**

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| **LEARNING OUTCOMES**  **The learner should be able to** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
| 1. Know how to use the ACAS Code of Practice to support work as a Union Rep. | 1.1 Summarise the purpose of the ACAS Code of Practice as defined by ACAS. | Activity 3 | Pages 28-32 |
| 1.2 Explain why the title of the ACAS Code of Practice may be considered misleading. | Activity 3 | Pages 28-32 |
| 1.3 Apply the ACAS Code of Practice to examples of situations that may be encountered by the Union Rep, identifying for each:   * the page and paragraph number of the relevant section * The appropriate text to formulate a response. | Activity 3  Activity 3  Activity 3 | Pages 28-32  Pages 28-32  Pages 28-32 |
| 1. Know how to use the Safety Reps and Safety Committees Regs 1977 to support work as a Union Rep. | 2.1 Summarise the purpose of the Safety Reps and Safety Committees Regs 1977. | Activity 3 | Pages 28-32 |
| 2.2 Apply the Safety Reps and Safety Committees Regs 1977 to examples of situations that may be encountered by the Union Rep. | Activity 3 | Pages 28-32 |
| 1. Know how to use other relevant legislation to support work as a Union Rep. | 3.1 Explain the importance of every Union rep being familiar with and comfortable using relevant materials and documents. | Activity 3 | Pages 28-32 |
| 3.2 List examples of other legislation that may be relevant to the work of a Union Rep. | Activity 3 | Pages 28-32 |
| 3.3 Apply other relevant legislation to examples of situations that may be encountered by the Union Rep. | Activity 3 | Pages 28-32 |

**NB** *You do not need to write in more than 2 occasions in the Evidence column e.g., first piece of evidence, best piece of evidence*

**All work is my own and does not contain any unacknowledged work from other sources.**

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|  | **RITS Code** |
| **Level 2** | L/617/9026 |

# Signed (Learner) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signed (Tutor) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Unit Title**: Understanding the history and structure of own union **1 credits**

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| **LEARNING OUTCOMES**  **The learner should be able to** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
| 1. Know the history of own union. | 1.1 Describe how own union was founded. | Activity 4 | Pages 33-35 |
| 1.2 Outline a brief history of how own union has developed over time. | Activity 4 | Pages 33-35 |
| 1. Understand the structure of own union. | 2.1 Outline the structure of own union including the:   * local level * regional level * national level. | Activity 4 | Pages 33-35 |
| 2.2 Identify the key components of own union branch to include:   * District office * Branch * Industry sector. | Activity 4 | Pages 33-35 |
| 2.3 Identify key contacts within own union branch to include:   * Officer * Area Activist committee * Equality Committee. | Activity 4 | Pages 33-35 |
| 2.4 Explain why the individual union rep plays such an important role in this structure. | Activity 4 | Pages 33-35 |
| 2.5 Outline the structure of own union including the:   * local level * regional level * national level. | Activity 4 | Pages 33-35 |

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| 1. Understand own union’s strategy. | 3.1 Outline the strategy in place for expanding own union. | Activity 10 | Pages 55-60 |
| 3.2 Explain strategy of growth in place for own union. | Activity 10 | Pages 55-60 |

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|  | **RITS Code** |
| **Level 2** | R/617/9027 |

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**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UNIT TITLE: The role of risk assessments in the work of the Union Rep. 1 credits**

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| **LEARNING OUTCOMES**  **The learner should be able to** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
| 1. Understand the legislation underpinning health and safety in the workplace. | 1.1 Identify the section and sub sections of the Health and Safety at Work Act 1974 relevant to risk assessments. | Activity 5 | Pages 37-42 |
| 1.2 State how the Health and Safety at Work Act 1974 defines the responsibility of the:   * Employer * employee. | Activity 5 | Page 37-42  Page 37-42 |
| 1.3 Give examples of other health and safety legislation used in the workplace. | Activity 5 | Pages 37-42 |
| 1.4 Explain why it is important for all employees to follow health and safety procedures in the workplace. | Activity 5 | Pages 37-42 |
| 1.5 Outline what information and support is available regarding health and safety in the workplace. | Activity 5 | Pages 37-42 |
| 1. Understand the role of risk assessments in ensuring health and safety in the workplace. | 2.1Define the terms:   * Hazard * Risk * Control measure * Extent of risk. | Activity 5 | Page 37-42 |
| 2.2 Explain why all Union Reps should have an understanding of Risk Assessments. | Activity 5 | Page 37-42 |
| 2.3 Give examples of how an individual employee can help prevent accidents in the workplace. | Activity 5 | Page 37-42 |
| 2.4 State the hierarchical list of control measures the need to be considered in relation to an identified hazard. | Activity 5 | Page 37-42 |
| 2.5 State the five individual stages of a risk assessment. | Activity 5 | Page 37-42 |
| 2.6 Undertake a risk assessment, identifying:   * existing controls * further controls required * responsible person * timescales for completion. | Activity 5  Activity 5 | Pages 37-42  Pages 37-42 |

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|  | **RITS Code** |
| **Level 2** | Y/617/9028 |

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**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UNIT TITLE: Agreements and collective bargaining 2 credits**

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| **LEARNING OUTCOMES**  **The learner should be able to** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
| 1. Be familiar with common workplace agreements. | 1.1 Explain why it is important for Union reps to understand the policies of their employer. | Activity 11 | Page 61-63 |
| 1.2 List a range of **common workplace agreements** that are found in place between unions and employers. | Activity 11 | Pages 61-63 |
| 1.3 Evaluate the fitness for purpose of existing agreements. | Activity 11 | Pages 61-63 |
| 1. Understand how to improve and enhance agreements. | 2.1 State what is meant be the term ‘collective bargaining’. | Activity 12 | Page 64-65 |
| 2.2 Explain the difference between an employer policy and an agreement between a union and an employer. | Activity 12 | Page 64-65 |
| 2.3 Explain why negotiated agreements are essential in employment relations. | Activity 12 | Page 64-65 |
| 2.4 Identify key negotiating anniversaries for improving agreements with employers. | Activity 12 | Pages 64-65 |
| 2.5 Explain how the organising model can assist with improving agreements. | Activity 12 | Pages 64-65 |
| 1. Understand actions which can be taken following failure of a negotiations. | 3.1 State the options available for action after negotiations fail. | Activities 10/11 | Pages 55-60/61-63 |
| 3.2 Explain with examples when each option for action is appropriate. | Activities 10/11 | Pages 55-60/61-63 |
| 3.3 Explain how strike action can be managed to be most effective. | Activities 10/11 | Pages 55-60/61-63 |

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|  | **RITS Code** |
| **Level 2** | D/617/9029 |

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**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UNIT TITLE: Using the organising cycle to prepare and deliver a campaign 3 credits**

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| **LEARNING OUTCOMES**  **The learner should be able to** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
|  | 1.1 Identify the four stages of the organising cycle and summarise what happens at each. | Activity 10 | Page 55-60 |
| 1.2 Identify how the organising cycle can be used as a problem-solving tool. | Activity 10 | Page 55-60 |
| 1.3 Describe strategies to take when things go wrong and the proposed action does not resolve the issue. | Activity 10 | Pages 55-60 |
| 1.4 Explain what is meant by ‘mapping’ in the context of the organising cycle. | Activity 10 | Pages 55-60 |
| 1.5 Develop a plan to map own workforce. To include:   * Identification of what information you need to undertake the task * How information can be gathered * Who is best placed to conduct the mapping? * How the mapping will be carried out * What format the mapping will be in * Any legal considerations which need to be taken into account. | Activity 10 | Pages 55-60 |
| 1. Understand how to develop a campaign strategy using the organising cycle. | 2.1 Identify a **range of issues** that may form the basis of a campaign. | Activity 20 | Pages 83 to 86 |
| 2.2 Produce a survey designed to collect member views. | Activity 20 | Pages 83-86 |
| 2.3 Produce a plan to conduct the survey. | Activity 20 | Pages 83-86 |
| 2.4 Decide upon a method to deliver the survey to your members that maximises the chance of a high response rate. | Activity 20 | Pages 83-86 |
| 1. Understand how to deliver the educate phase of a campaign. | 3.1 Draft a letter seeking permission to circulate campaign survey. | Activity 21 | Page 87-88 |
| 3.2 Design a method of communicating to your membership:   * the issue subject to campaign * the existence of the survey * the importance of high response levels to the survey. | Activity 21  Activity 21 | Pages 87-88  Pages 87-88 |
| 3.3 Identify and respond to questions members may have about the survey and their responses to it. | Activity 21 | Pages 87-88 |

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| **Level 2** | R/617/9030 |

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**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UNIT TITLE: Dignity and equality at work 2 credits**

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| **LEARNING OUTCOMES**  **The learner should be able to** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
| 1. Know the main types of negative behaviours or situations which can be experienced in the workplace. | 1.1 Define the terms:   * Prejudice * Discrimination * Diversity * Equality * Equal opportunities * Bullying * Harassment * Banter | Activity 22/23 | Pages 90-91/92-93  Pages 90 and 91 |
| 1.2 Outline who can be affected by prejudice and discrimination. | Activity 22 | Pages 90-91 |
| 1.3 Identify a range of common issues surrounding equality that exist in workplaces. | Activity 22  Activity 23 | Pages 90-91  Pages 92-93 |
| 1. Understand the impact of negative behaviours and experiences in the workplace. | 2.1 Describe the impact of discriminate behaviours on:   * the individual experiencing the discrimination * the employer * the workforce as a whole. | Activity 23 | Pages 92-93 |
| 2.2 Identify potential legal implications for member’s that can result from their actions. | Activity 24 | Pages 94-97 |
| 2.3 Identify the benefits of treating everyone with dignity and respect. | Activity 22 | Pages 90 and 91 |
| 2.4 Describe the impact of discriminate behaviours on:   * the individual experiencing the discrimination * the employer * the workforce as a whole. | Activity 9  Activity 22  Activity 23 | Pages 52-54  Pages 90-91  Pages 92-93 |
| 1. Understand income equality. | 3.1 State the National Living Wage for:   * under 25s * over 25s. | Activity 28  Activity 28 | Pages 106-107  Pages 106-107 |
| 3.2 State the minimum annual income level for:   * a single person * a couple with two children. | Activity 28 | Pages 106-107 |
| 3.3 Summarise the law which requires publication of salary information. | Activity 28 | Pages 106-107 |
| 3.4 Describe the impact of income inequality on:   * the employer * those receiving a higher level of pay * those receiving a lower level of pay. * the workforce as a whole. | Activity 28 | Page 106-107 |
| 1. Understand equality and the law. | 4.1 Describe the way that equality law has developed in the UK over time. | Activity 9 | Page 52-54 |
| 4.2 Explain the difference between direct and indirect discrimination. | Activity 9 | Pages 52-54 |
| 4.3 Describe the range of legal responses possible when equality is compromised. | Activity 9 | Pages 52-54 |
| 4.4 Describe the possible consequences of being found in breach of equality law for:   * an individual * an employer. | Activity 9 | Pages 52-54 |
| 4.5 Apply knowledge of equality law to specific tribunal cases in the workplace. | Activity 9 | Pages 52-54 |

**NB** *You do not need to write in more than 2 occasions in the Evidence column e.g. first piece of evidence, best piece of evidence*

**All work is my own and does not contain any unacknowledged work from other sources.**

|  |  |
| --- | --- |
|  | **RITS Code** |
| **Level 2** | Y/617/9031 |

# Signed (Learner) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signed (Tutor) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UNIT TITLE: Understanding workplace policies and procedures. 1 credits**

|  |  |  |  |
| --- | --- | --- | --- |
| **LEARNING OUTCOMES**  **The learner should be able to** | LEVEL 2 **The learner has achieved the outcome because s/he can** | EVIDENCE | LOCATION |
| 1. Understand the role and application of a grievance policy. | 1.1 Outline the purpose of a grievance policy. | Activity 30 | Pages 109-110 |
| 1.2 Assess a policy’s compliance with legislation and the ACAS guide. | Activity 30 | Pages 109-110 |
| 1.3 Outline the rules around accompanying a member to a grievance meeting. | Activity 30 | Pages 109-110 |
| 1. Understand the role and application of family friendly policies. | 2.1 Identify the legal rights that employees have in relation to family friendly working. | Activity 26 | Pages 101-103 |
| 2.2 List **policies** commonly in place to support and accommodate family friendly practices in the workplace. | Activity 26 | Pages 101-103 |
| 2.3 Identify key points of common family friendly working related issues found in workplaces. | Activity 26 | Pages 101-103 |
| 2.4 Identify the legal rights that employees have in relation to family friendly working. | Activity 26 | Pages 101-103 |
| 1. Understand the role and application of a disciplinary policy. | 3.1 Outline the purpose of a disciplinary policy. | Activity 32 | Pages 113-114 |
| 3.2 Assess a policy’s compliance with legislation and the ACAS guide. | Activity 32 | Pages 113-114 |
|  | 4.1 Outline the purpose of dignity and respect policies. | Activities 22/23 | Pages 90-91/92-93 |
| 4.2 Assess the fitness for purpose of a dignity and respect policy. | Activities 22/23 | Pages 90-91/92-93 |

|  |  |
| --- | --- |
|  | **RITS Code** |
| **Level 2** | H/617/9033 |

**NB** *You do not need to write in more than 2 occasions in the Evidence column e.g. first piece of evidence, best piece of evidence*

**All work is my own and does not contain any unacknowledged work from other sources.**

# Signed (Learner) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signed (Tutor) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_

# ACTIVITY 1: Introductions and our stories

***Learning outcomes: - N/A***

**AIMS:** To help us –

Get to know each other.

Work out aims for the course.

Practice interviewing and note taking.

**TASK:**

1. Your tutor will ask you to interview and introduce another course member, make brief notes and introduce the member to the larger group. Find out the following information:

• Name.

• Workplace and job.

• How many members represented.

• What they want to get out of the course.

1. When you have each finished interviewing and making the introductions, group members are invited to tell us:

• How and why you became a Unite Rep.

• Any outside interests e.g. active in the local labour party, school governor or PTA member or links to other social or sporting clubs or associations?

**NOTES**

# ACTIVITY 2: Unite Reps Roles and Responsibilities

***Learning Outcomes: - Roles and responsibilities of the union rep 1.1,1.2,1.3***

**AIMS:** To help us –

Develop understanding of the various roles of the Unite rep.

Consider the skills required by the Unite rep to do the job effectively.

Understand the rep’s role in the organising cycle.

**Resources: -** *From page 9 in resources might help*

**TASK A:**

Discuss the following in your groups make notes and report back.

1. Think back to the introductory activity which asked why and how group members became a Unite rep. What common themes emerged?

|  |
| --- |
|  |

1. What are the most important roles of the Unite rep?

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|  |

1. How do you exercise your rights as a rep?

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1. What skills does the Unite rep need in order to be able to do the role effectively?

…

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1. Who else is part of the Unite team in your workplace? For example, Safety rep, Learning rep, Equalities rep?

|  |
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|  |

1. Who can support you in each aspect of your role as a rep?

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1. Who are you, as a Unite rep, responsible to?

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Decide who will lead your group discussion and who will give the report back on each part of the task to the larger group.

**ACTIVITY 3: Unite Reps Rights**

***Learning Outcomes: - Legislation and codes of practice relevant to the union rep 1.1,1.2,1.3,2.1,2.2,3.1,3.2,3.3***

**AIMS:** To help us –

Become familiar with using the ACAS Code of Practice.

Become familiar with using the Safety Reps and Safety Committees Regs 1977.

Become familiar with using any other relevant legislation.

Become familiar with key union documentation.

Identify citations and arguments to ensure employers comply with the requirements of the Code of Practice.

**Resources: -** *ACAS COP time off for trade union Duties (Page 50)*

*& TUC Brown Book (page 16)*

**TASK:**

Consider the following statements in your groups and carefully consult the ACAS

Code of Practice on Time Off for Trade Union Duties and Activities/Safety Reps and Safety Committees Regs/any other relevant legislation. Examples of which can be found in the index section of your course resources book and are covered in detail throughout the course.

Make a note of:

* Page Number.
* Paragraph number.
* The appropriate text in respect of using the Code of Practice to formulate a response.

1. You request that management permit you and your members to finish the shift 20 minutes early so you can discuss their pay offer. Management say that you should do this in your own time, when the shift is finished. **(ACAS Code of Practice)**

|  |
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2. There has been a near miss but nobody has been hurt. Management says there is no reason for you to waste time doing an investigation. **(Safety Reps and Safety Committees Regs 1977)**

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3. “You can go on the Workplace Reps/Health and Safety Reps/Union Learning Reps Course/Equality Reps course when we are able to release you and not before.” **(ACAS Code of Practice)**

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4. The agenda and minutes of a regular monthly meeting are always printed in Arial 12 font. A newly elected Rep has difficulty reading them. What do you do? **(Other Legislation)**

|  |
| --- |
|  |

5. You hear that a health and safety inspector has visited the workplace where you are a safety rep. Neither management nor the inspector contacted you. **(Safety Reps and Safety Committees Regs 1977)**

|  |
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6. “We provide our own training on employer-employee relations, so you don’t need to go on a Unite course.” **(ACAS Code of Practice)**

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7. Your employer says they will require Trade Union Learning Reps to take a test to ensure they are qualified to take up the position of Learning Rep. **(ACAS Code of Practice)**

|  |
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|  |

8. A member complains to her safety rep that she is being bullied by her supervisor. The safety rep’s line manager says this is not a health and safety matter and refuses to allow the safety rep to see her member privately to investigate. **(Safety Reps and Safety Committees Regs 1977)**

|  |
| --- |
|  |

9. Following an illness, a member of staff who has worked on site for over 10 years is now a wheelchair user. Their former workstation is on the top floor of three. What do you do? **(Other Legislation)**

|  |
| --- |
|  |

10. “The rewriting of job description for new staff is none of your concern, since these new staff might not want to join Unite” **(ACAS Code of Practice)**

|  |
| --- |
|  |

11. An employer shall permit an employee of his who is a learning representative of the trade union to take time off during his working day for any of the following purposes: - **(ACAS Code of Practice)**

|  |
| --- |
|  |

12. An hour after you finished an inspection, someone tripped and injured themselves on a staircase. Management says that you are partially responsible for not reporting this hazard and may be legally liable. **(Safety Reps and Safety Committees Regs 1977)**

|  |
| --- |
|  |

13. How does ACAS sum up the purpose of the Code of Practice? **(ACAS Code of Practice)**

|  |
| --- |
|  |

14. What is misleading about the title of the ACAS Code of Practice? **(ACAS Code of Practice)**

|  |
| --- |
|  |

It is important to highlight to the students the relevance of the information that they will be looking at in this activity. The activity also identifies that no matter what role they may be elected to within Unite they should be able to read through material to get to a suitable outcome for the benefit of themselves and their members.

# ACTIVITY 4: Unite Structures and where you fit in.

***Learning Outcomes: - Roles and responsibilities of the union rep 3.1,3.2,3.4,4.1 Understanding the history and structure of own union 1.1,1.2,2.1,2.2,2.3,2.4,2.5,***

**AIMS:** Demonstrated an understanding of Unite`s structure at local regional and national level.

Identified the three pillars of Unite`s strategy.

Identified the importance of the Unite Reps in the structure.

**Resources: -** *Unite structures presentation & Page 77 (Tutor delivered & available on PowerPoint at* https://learnwithunite.org/

**TASK 1:** **The tutor will give you a presentation on the following: -**

1. The structure of Unite. (Including the importance of the Rep)
2. The strategy of expanding the union.
3. Three pillars (organising, political influence, international influence)

**TASK 2:** On the following page add the missing details including.

* Your officer
* Your district office
* Your branch
* The sector your industry is in
* The nearest Area Activist committee to your home address
* Whether you are covered by any equality committees, if so which

Regional Committee

Executive Council

National Equalities Committees

National Political Committees

National Industrial Sector Committee

Regional Political Committee

Regional Equalities Committees

My Equalities

My AAC

Area Activist Committee

My Sector

Regional Industrial Sector Committee

My District Office

My Officer

My Unite

My Branch type

Branch

Retired Members Forum

Task 3

1. Outline the role of the branch, what can, or do they do for members?

|  |
| --- |
|  |

1. List the main decision - making bodies within own trade union.

|  |
| --- |
|  |

1. Indicate how policy is made in own trade union. How often do policies or rules change and how?

|  |
| --- |
|  |

4. Outline the process for recruiting new members to UNITE

|  |
| --- |
|  |

# Our History and Our Politics Presentation (day four)

Your tutor will allocate you a subject for your day four research presentation, you may find some of the links below useful!

[www.historic-uk.com/HistoryUK/HistoryofEngland](http://www.historic-uk.com/HistoryUK/HistoryofEngland)

[www.tuc.org.uk/about-tuc/union-history](http://www.tuc.org.uk/about-tuc/union-history)

[www.historytoday.com](http://www.historytoday.com)

<http://spartacus-educational.com/IRowen.htm>

[www.britannica.com](http://www.britannica.com)

[www.historyguide.org](http://www.historyguide.org)

[www.bbc.co.uk/history](http://www.bbc.co.uk/history)

<http://news.bbc.co.uk/onthisday>

[www.youtube.com](http://www.youtube.com)

[www.historyextra.com](http://www.historyextra.com)

[www.unionhistory](http://www.unionhistory)

**Activity 5: Risk Assessments**

***Learning Outcomes: - Roles and responsibilities of the union rep 1.4 The role of risk assessments in the work of the union rep 1.1,1.2,1.3,1.4,1.5,2.1,2.2,2.3,2.4,2.5,2.6***

**Resources: -** *TUC Brown Book (Page 16) from page 78 of the resources*

**Task 1**

**1,** What sections/Sub sections of the **HASAWA 1974** define the main responsibility of the following?

|  |  |
| --- | --- |
| Employer | Employee. |

**Why should all Unite representatives have an understanding of Risk assessment? Discuss this in your group and list some of your joint reasons here.**

|  |
| --- |
|  |

**2. Name at least 2 pieces of H&S Legislation used in your workplace.**

|  |
| --- |
|  |

**3. Why should we all follow H&S procedures in the workplace?**

|  |
| --- |
|  |

**4. What information or support is available to you regarding H&S in the workplace**

|  |
| --- |
|  |

**Task 2**

Reg 3 of the MHSWR places a requirement on the employer to carry out risk assessments, undertaken by a **Competent Person** who is defined as a “person who has knowledge and understanding of the work being assessed, the principles of RA and prevention of risk and how to identify hazards” Understanding Risk Assessment, therefore we need to understand what the basic principle of risk assessment Provide a brief description of the following terms.

|  |  |
| --- | --- |
| Hazard |  |
| Risk |  |
| Control Measure |  |
| Extent of risk |  |

The tutor will have provided you with a verbal scenario to help illustrate the relationship between hazard risk and Controls.

Below please state the hierarchical list of Control Measures, that need to be considered regarding the identified hazard,

|  |  |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

Please state below, what the individual 5 stages of a Risk Assessment are:

|  |  |
| --- | --- |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |

**Task 3**

Using the Hazard Spotting illustration supplied to you by your tutor, along with a RA form pick 3 to 4 hazards (depending on group size) within the group, then each member should undertake a risk assessment of that individual hazard, and identify what controls already exist and what further control measures need to be introduced to reduce the risk further, identify who should be responsible for implementing action and set timescales for completion. The individual group members then need to record the other team member’s RA into their own RA sheet.

Resources required Hazard Spotting illustration, Risk Assessment Sheet and Risk Rating Sheet

**Risk Assessment Scenario**

As a group of Unite Reps you have been allocated an office that is to be a dedicated room for the use of all reps on site. You intend to use the room for storing Unite stationary, holding pre-meetings with fellow reps and holding any necessary interviews etc. The room is on the second floor of the administration area of the site and was previously used by management.

The plan is as the room is laid out at present.

Your task is to carry out a Risk Assessment looking at any hazards that you can identify, who might be harmed and how, possible control measures etc.

Produce the risk assessment and report back to the whole group.

**Fan**

**External window**

**Bookcase/Shelf**

**Storage Locker**

**Coffee Table with Kettle**

**Chair**

**Chair**

**Desktop PC**

**Table**

**Doorway**

**Task 4**

Provide at least 2 examples of how **YOU** can help prevent accidents in the workplace.

|  |
| --- |
| 1  2 |

**All employers must conduct a risk assessment. If you have fewer than five employees, you don't have to write anything down.**

# Risk assessment

**We have started off the risk assessment for you by including a sample entry for a common hazard to illustrate what is expected (the sample entry is taken from an office-based business). Look at how this might apply to your business, continue by identifying the hazards that are the real priorities in your case and complete the table to suit. You can print and save this template so you can easily review and update the information as and when required. You may find our example risk assessments a useful guide (**<http://www.hse.gov.uk/risk/casestudies>**). Simply choose the example closest to your business.**

### Company name:       Date of risk assessment:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **What are the hazards?** | **Who might be harmed and how?** | **What are you already doing?** | **Do you need to do anything else to control this risk?** | **Action by who?** | **Action by when?** | **Done** |
| Slips and trips | Staff and visitors may be injured if they trip over objects or slip-on spillages. | General good housekeeping is carried out.  All areas well lit, including stairs.  No trailing leads or cables.  Staff keep work areas clear, eg no boxes  left in walkways, deliveries stored immediately. | Better housekeeping in staff kitchen  needed, eg on spills.  Arrange for loose carpet tile on second floor to be repaired/replaced. | All staff, supervisor to monitor  Manager | From now on  xx/xx/xx | xx/xx/xx  xx/xx/xx |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  | \***Hint**, tab here for new row\* |

You should review your risk assessment if you think it might no longer be valid (eg following an accident in the workplace or if there are any significant changes to hazards, such as new work equipment or work activities)

For information specific to your industry please go to [[http://www.hse.gov.uk](http://www.hse.gov.uk/).](#_Hlk110917549%091,4557,4611,0,,%13%20HYPERLINK%20%22http://www.hse.gov.)

For further information and to view our example risk assessments go to <http://www.hse.gov.uk/risk/casestudies/>

Combined risk assessment and policy template published by the Health and Safety Executive 08/14

# ACTIVITY 6: Giving Information, Advice and Guidance

***Learning Outcomes: - Roles and responsibilities of the union rep 2.1 Skills required by the union rep 4.1,4.2,4.3***

**AIMS:** Be prepared to meet members

Developed information gathering skills

Offering members options not answers

Your tutor will deliver a short presentation to introduce you to the concept of delivering Information, Advice and Guidance. (See also Page 91 of the resources)

**TASK 1:**

**In your group examine the case studies provided by the tutor and then do the following:-**

1. Highlight the relevant issues.
2. What course of action would you take and why?
3. What would you need from the list below to provide effective advice and guidance to a member?

* Employer
* Unite
* External body
* Any other

Decide who will lead your group discussion and who will report back to the larger group.

**Case Studies**

**One**

**Julie**

The company is undergoing a restructure exercise. They have announced that the unskilled section of the workforce is at risk of redundancy. 80% will be provided with alternative employment and trained in the skills required. It is hoped that the 20% redundancies will be achieved by volunteers but if unable to do so then compulsory redundancies will have to be made.

A member Julie who is profoundly deaf, she can lip read and speak in a very basic language, comes to see you as her representative and tells you that her line manager has just called her into his office to tell her that she is to be made compulsory redundant as it will be impossible to train her in the new role and that it will be unsafe for her to continue to work as Fork Lift Trucks will now be operating in all areas of the site.

Julie says that she feels she is being discriminated against.

**Two**

One of your members arranges a meeting with you to discuss a health and safety issue. A new task has been introduced to the operation that involves manual handling of a large, heavy, item. The member has raised concerns with his department supervisor but is told in no uncertain terms “To get on with it and if you don’t like it you know where the gate is. There are people willing to work if you don’t”

How do you as the Rep deal with this scenario, who would you seek support or information from?

|  |
| --- |
| **One** |
| **Two** |

# ACTIVITY 7: Why Join Unite? Making the case a role for all reps

***Learning Outcomes: - Roles and responsibilities of the union rep 4.2,4.3,4.4***

**Resources: -** *From page 93 in resources might help*

**AIMS:** Summarise the case for trade unionism and trade union membership.

Think about how to talk to and influence people.

Think about ways of getting the Unite story across to membership

**TASK:**  Complete following tasks.Think back on some of the points discussed earlier in the course to help you with the task.

**Look at the stories told within the resources on page 93 as to why they have joined Unite.**

1. In your group think about the kind of things people say to explain why they are not a union member. Using table 1 on the notes page identify reasons people give for not being a union member, in the right-hand column give the UNITE response.
2. In your group think about the kind of things current membership say about why they are dissatisfied with the union and why they don’t participate as fully as they might Use the left-hand column of table 2 for this and then use the right-hand column for the UNITE response.
3. Draw up a group report giving examples of group members successful stories of recruitment within their workplace covering any of the following:
4. Inductions
5. Non-union recognised groups e.g., white collar section, Agency Staff

3. Permanent contractors, e.g., catering staff

Detail one example below in table 3

Decide who will lead your group discussion and who will report back to the larger group.

##### Table 1

|  |  |
| --- | --- |
| Why do people say they are not union members? | What is the UNITE response |
| 1 | 1 |
| 2 | 2 |
| 3 | 3 |

Table 2

|  |  |
| --- | --- |
| Why are people dissatisfied with the union? Why do people not participate as much as they might? | The UNITE response |
| 1 | 1 |
| 2 | 2 |
| 3 | 3 |

Table 3

|  |
| --- |
|  |

# ACTIVITY 8: Building Unite – to 100 percent active membership

***Learning Outcomes: - N/A***

**AIMS:** To help us –

Practice communicating the Unite story effectively.

Identify strategies for getting the Unite case for proactive organisation across.

Use active listening.

**TASK:**

You will recall the activity Why Join Unite? Making the Case where pro and antiunion arguments were identified. This activity aims to allow us to practice putting forward pro-union arguments while dealing with anti-union objections.

**Step 1 Preparation:** The course will be split into groups of three. Each group member will take a turn to be a union rep, a non-member or existing member who is critical of the union or apathetic towards it, and an observer.

**Step 2 The activity:** The student who is acting as a Unite Rep should suggest to the non-believer/non-member the benefits of being in Unite. They must be able to confidently deal with any negativity that is put to them.

**Step 3 Session feedback:** The role of the observer, following the interaction, is to offer helpful advice, discussing it with the two other group members. See the checklist in resources. Each conversation should take no more than five minutes.

Consult the material in Resource Pack headed The Trade Union Premium, Skills tip

– Starting a Conversation and the Conversation Observer’s Checklist prior to starting.

**Step 4** Drawing conclusions: Once the conversations have been completed, in your group of three, identify three pieces of advice on talking about Unite to non-members and critical members to put forward to a course discussion.

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|  |

Decide who will lead your group discussion and who will report back to the large group.

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

**Observer evaluation and feedback**

|  |
| --- |
| **Strengths:** |
| **Areas for development:** |
| **Action required to improve your delivery for the future:** |

**This feedback can remain confidential, or you may sign your name if you wish.**

Name: …………………………………………Signature: …………………………………

# ACTIVITY 9: Equality and the Law

**Your tutor will deliver a short presentation outlining the Equality Act 2010 and its key points; this will aid you in the following activity.**

***Learning Outcomes: - Dignity and equality at work 2.4 4.1,4.2,4.3,4.4,4.5***

**AIMS:** To help us –

Understand the way equality law has developed in the UK.

Clarify the difference between direct and indirect discrimination.

Investigate the range of responses applicable when equality is compromised.

**Resources: -** *ACAS Guide to EQ Act (page 99 of the resources)*

**TASK:**

Working in groups, discuss the case studies below.

Prepare a group report on:

• What areas of discrimination they refer to.

• Whether they refer to direct or indirect discrimination.

• Suggest a strategy for dealing with each case.

Apart from a change to number 1 and number 7, these case studies are from the

Commission for Equality and Human Rights (CEHR) website

www.equalityhumanrights.com

1. During an interview Elizabeth refers to the church she attends regularly. Although she has the skills to do the job successfully the interviewer doesn’t employ her as he feels her Christian Fundamentalist views will be likely to upset other workers with different faiths and none.

|  |
| --- |
|  |

1. The workplace has a youthful workforce, mostly around the age of 30 to 35. There is a vibrant social scene with events being organised some week nights and at weekends. The two or three workers who are over 50 don’t get invited.

|  |
| --- |
|  |

1. Maria has restricted vision and works as a receptionist in the social services department. Every month she attends a departmental meeting in a room away from her workstation. The minutes are usually printed in point 12 type which she finds very difficult to read.

|  |
| --- |
|  |

1. A building contractor specifies that applicants must be over 6 feet tall even though this is unconnected with the ability to do the job.

|  |
| --- |
|  |

1. The English-speaking Indian born employee of an international Japanese bank in London resigned claiming he had been made to feel like a second-class citizen by his English-speaking Japanese employers. He said he had been humiliated, excluded by workers speaking Japanese and underpaid, simply because he was not Japanese. The bank argues that it is natural for Japanese staff to use their own language among themselves.

|  |
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1. While being interviewed for promotion Mary says that she has a female partner. Although she has the skills, experience and competence to do the job the organisation decides not to offer the promotion to her fearing her sexuality will upset other employees.

|  |
| --- |
|  |

1. Elizabeth (Case study 1) eventually secures the job and Mary gets her promotion (Case study 6). At the end of the first week Elizabeth complains to her manager that she objects to working with Mary on account of Mary’s sexuality. Mary then complains to her manager that Elizabeth’s views on her sexuality are homophobic and offensive.

|  |
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Decide who will lead your group discussion and who will report back to the larger group on each of the case studies.

# ACTIVITY 10: Using the Organising cycle & Why Map your workplace

***Learning Outcomes: - Using the organising cycle to prepare and deliver a campaign 1.1,1.2,1.3,1.4,1.5 Agreements and collective bargaining 3.1 3.2***

**AIMS:** Introduce you to the Organising Cycle

Identify how it can be used as a problem-solving tool

Develop strategies if things go wrong

Understand what is meant by mapping

Develop a plan to map your workplace

**RESOURCES See page 130**

**TASK 1:** Your tutor will introduce you to the organising cycle, the four stages and what happens at each stage. You will be using the cycle later in the course so you may find it beneficial to take some notes.



**TASK 2:** Your tutor will introduce you to what is meant by mapping, and they will stress to the students the importance for all reps of mapping in the workplace. The tutor should give examples of mapping stating the relevance with the various rep’s roles i.e., membership, skills within the workforce, suitability of PPE, gender issues, training needs and anything else anyone can add.

Then in your teams you will answer the following questions and develop a mapping strategy for your workplace.

1.To map your workplace effectively what information do you feel you will need?

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2. How would you get this information?

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3. Who would carry out the mapping and how?

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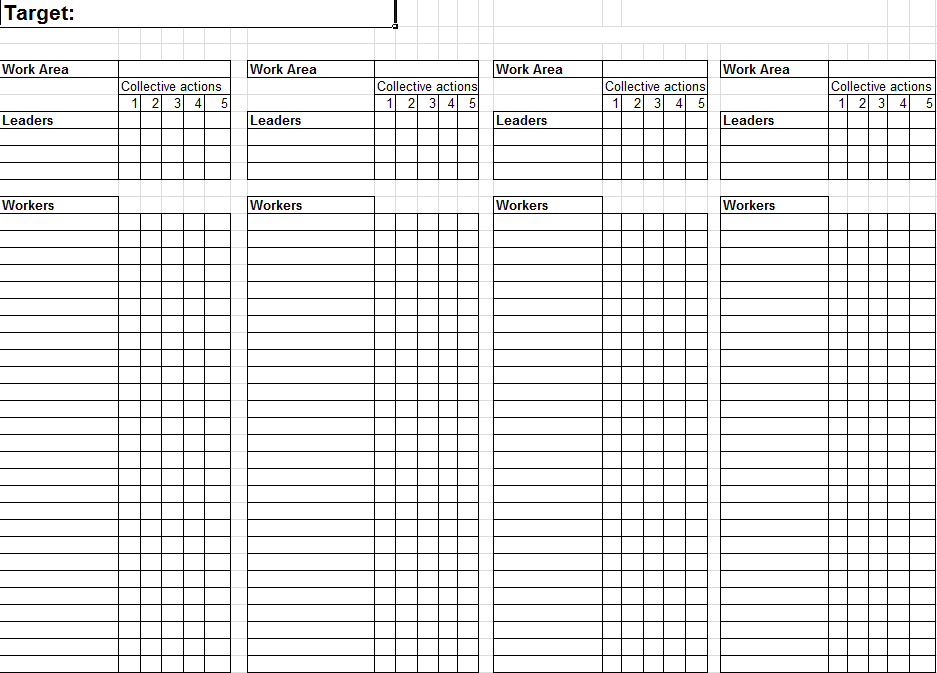
4. What format would your mapping take (paper based or electronic) and how would you store it?

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5. What legal considerations are there about the data on your map if any?

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**Select a spokesperson to report back to the main group.**



**Workplace reconnaissance form**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Name of Company & site location** | |  | | | | | | |
| **Name of rep completing form** | |  | | | | | | |
| **Unite officer name** | |  | | | | | | |
| **Type of Company (sector)** | |  | | | | | | |
| **Name of senior rep / Convenor** | |  | | | | | | |
| **Have all reps had training** | | **Yes** | |  | **No** | | |  |
| **HR Contact Name** | |  | | | | | | |
| **Total Number of Unite Members** | | **In bargaining Unit** | | | | **Not in Bargaining unit** | | |
|  | | | |  | | |
| **Total number of employees** | |  | | | |  | | |
| **Total number of Agency staff on site** | |  | | | |  | | |
| **Name of Agency if known** | |  | | | |  | | |
| **Membership potential** | |  | | | |  | | |
| **Do you have a facilities agreement?** | | **Yes** |  | | | **No** |  | |
| **Do you have a learning agreement** | | **Yes** |  | | | **No** |  | |
| **Do you have access issues** (not able to speak to non-members to recruit them) | | **Yes** |  | | | **no** |  | |
|  | | | | | | | | |
| **What current issues are in your workplace?** | |  | | | | | | |
| **What support do you need to strengthen workplace structures, ie facilities, recruitment, more reps?** | |  | | | | | | |
| **Has your workplace already run a 100% campaign** | | **Yes** |  | | | **No** |  | |
| **If yes when was this** | |  | | | | | | |
| **Give brief details of the activities involved in the campaign** | |  | | | | | | |
| **Which other unions are in the workplace** | |  | | | | | | |
| **Pay anniversary date** |  | **Last % Pay Rise** | | | |  | | |

**ADDITIONAL NOTES**

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# ACTIVITY 11: Collective bargaining and the broad industrial strategy

***Learning Outcomes: - Agreements and collective bargaining 1.1,1.2,1.3,3.1,3.2,3.3***

**Resources:** *Broad Industrial Strategy booklets (tutor to distribute and collect in) These are available on your memory stick*

**AIMS:**

* Become familiar with your workplace agreements, including Recognition, facilities and learning agreements.
* Become familiar with the Broad industrial strategy and how to access / share your agreements.
* Identify any areas for improvement within your agreements.

**Introduction:**

Your tutor will play the introduction to ‘Work, Voice, Pay’ by Sharon Graham. (Or deliver the presentation)

**TASK 1:** Answer the questions below for your workplace

Also look at the workplace reconnaissance form and see what you can complete about your workplace

|  |  |
| --- | --- |
| **Do you have** | **Yes / No** |
|  |  |
| A Recognition agreement? |  |
| 1. Do you have a copy? |  |
| 1. Is a copy available on the ‘Work, Voice, Pay website? *(Have your tutor check this)* |  |
| A Facilities agreement? |  |
| 1. Do you have a copy? |  |
| 1. Is a copy available on the ‘Work, Voice, Pay website? *(Have your tutor check this)* |  |
| A Learning agreement? |  |
| 1. Do you have a copy? |  |
| 1. Is a copy available on the ‘Work, Voice, Pay website? *(Have your tutor check this)* |  |
|  |  |

**TASK 2:**

In your groups compare your workplace agreements to each other’s and also the model agreements available on the ‘Work Voice Pay’ area of the website, making a note of any deficiencies in your agreements when compared with those of other group members.

Include in your review:

1. How does Unite and any other unions have the right to represent and negotiate in your workplace?

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1. How does the organisation commit itself to “encourage” employees to join the union / engage in the learning agenda?

|  |
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1. How does the agreement specify the grade or grades, areas or departments covered?

|  |
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|  |

1. How does the organisation offer the facility to deduct subs from pay (commonly known as check off)?

|  |
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1. How are management and union committed to negotiate on all matters or are some areas excluded?

|  |
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|  |

1. How is the employer committed to prior consultation and negotiation on the implementation of any changes in terms, conditions and working practices?

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1. How is the employer committed to providing adequate facilities for Unite reps?

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1. Do you have a workplace safety committee and are Unite reps members? If so give details.

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1. What benefits does a learning agreement bring to your organising activities?

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***A*CTIVITY 12: Improving or enhancing your agreements**

***Learning Outcomes: - Roles and responsibilities of the union rep 3.3 Agreements and collective bargaining 2.1,2.2,2.3,2.4,2.5***

**Resources:** *From page 134 of resources*

**AIMS:** To help us –

Use key negotiating periods to improve your agreements e.g. Pay anniversary or a change of management personnel or structures.

Understand how the Organising Model assists in dealing with problems arising from your terms and conditions.

**Introduction:**

Our agreements should not be tucked away in a drawer gathering dust. We should look to improve on them at key negotiating periods and enhance them wherever possible.

Over 700,000 workers are covered by a Unite learning agreement, are you? If not, why? Usually the answer is we haven’t asked the employer, now’s the time to consider how you can do this! As we have seen from earlier activities Equality representatives do not have statutory rights at work. Can we use our workplace agreements to overcome this?

**TASK 1:**

1. What is meant by the term collective bargaining what are the features and goals?

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|  |

1. What is the difference between an employer policy and an agreement between a union and an employer?

|  |
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1. Consider the previous activity – which old policies and agreements in the workplaces of group members need reviewing?

|  |
| --- |
|  |

1. What new policies and agreements do you think need to be introduced, or existing

ones updated or changed?

|  |
| --- |
|  |

1. How and when will you do this?

|  |
| --- |
|  |

1. Why are negotiated agreements essential in employment relations?

|  |
| --- |
|  |

1. Why it is important Unite reps understand their employer’s policies?

|  |
| --- |
|  |

**ACTIVITY 13: Mental ill Health and Issues in the Workplace**

***Learning Outcomes: - N/A***

**Aims:** To help us

* increase our knowledge of mental health issues
* increase our knowledge of the employer’s duties
* advise members on their rights at work
* Develop a mental health strategy in your workplace

**Task:**

In your groups:

* What do you think are common mental health issues?
* What could influence mental ill health in the workplace and personal experience
* How well informed are your reps (and members) on mental health issues
* What do you feel are some of the problem’s members suffering a mental health issue in the workplace face and what could we do to help?
* What can we do (all reps)?

Resources

ACAS – Promoting positive mental health in the workplace

What is mental ill health – common mental illnesses

Unite mental health guide

**Elect a spokesperson to report back to the main group**

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###### **Activity 14: Mental ill Health and Issues in the Workplace – Case studies**

###### 

***Learning Outcomes: - N/A***

**Aims:** To help us

* increase our knowledge of mental ill health
* Understand the effects of personal experiences in relation to mental health and wellbeing
* Understand the effects of workplace influence in relation to mental health and wellbeing
* Understand the importance of developing a mental health strategy in your workplace

**Task:**

In your groups:

Read and discuss the following case studies

* Stephen’s story
* Susan’s story

Resources

ACAS – Promoting positive mental health in the workplace

What is mental ill health – common mental illnesses

Unite mental health guide

Mind – Mental health facts and statistics

Susan a 20-year-old part-time administrative assistant, had been employed in this role for 10 months working 30 hours per week.

She hadn't received any training and her line manager had left 4 months after Susan had started her role. The company had yet to recruit a new person to this post. Susan was temporarily being line managed by Paul who was from a different department who was based 60 miles away at a different site.

Susan had been keen to make a good impression and had worked hard to develop her new role but had been struggling with the lack of support and training she had received.

Susan found it hard to switch off when she went home at night, and was experiencing difficulties in sleeping. Susan had taken to having a glass of wine in the evening to help her to unwind, this had now increased to several glasses of wine.

Her partner John found that Susan's behaviour had become very aggressive and argumentative. He had told her that he could no longer cope with this and had moved out of the family home.

Susan began to experience difficulties in the workplace. She often turned up late at work and the quality of her work began to deteriorate. She also had called in sick on the occasional day on more than one occasion. Her temporary line manager Paul arranged to see her due to several complaints he had received and concerns raised about her attendance record.

When Susan arrived at Paul's office, she broke down in tears and described previous short-term absences resulting from nausea and vomiting, relating these to her anxiety at attending work. She explained that over the previous five to six weeks, in addition to nausea she had also experienced difficulty sleeping, restlessness, loss of appetite, palpitations and rumination on her low self-esteem. Susan explained that her relationship with her boyfriend had been affected and she was experiencing unpleasant thoughts daily and negative mood.

1) What's going on with Susan?

2) What's triggered this?

3) What should her line manager now do?

4) What could you do as a Unite rep?

|  |
| --- |
| **Susan** |

Stephen works in a factory. Staff morale has been bad for some time now since the sudden death of a colleague. The person took ill suddenly and sadly died and the employer didn’t address the issue with the rest of the workforce. Staff had been left reeling by the death of this well-like colleague and there was no outlet for them to convey how they felt.

Some of the other staff were clearly affected by this passing and Stephen was left supporting some of his colleagues emotionally through this tough time. Stephen too, missed his friend, he had been his “go to” person when he had a problem and he was starting to drink more in the evenings when he got home from his work. This was leading to Stephen not being quite “fit” for work the next day due to suffering from hangovers some days.

One day, Stephen forgot to do some safety checks and a pallet of goods spilled pieces of machinery all over the floor, thankfully no-one was hurt but Stephen’s supervisor started an investigation. When Stephen was interviewed the supervisor asked him if he had been drinking. Stephen hadn’t but knowing the implications of someone getting hurt he admitted he felt a bit hung over with a headache.

His supervisor asks if anything is going on with Stephen, that he wasn’t his usual self. Stephen breaks down – relieved that someone has asked how he’s doing. He tells him he is missing his friend, that one minute he was there and the next he was gone. The supervisor mentions that some of the guys had told him that Stephen had been a great help to them. He asks Stephen who has been supporting him, who does he talk to? Stephen replies “no-one”

1. What is going on with Stephen?
2. Why is Stephen drinking?
3. How can the supervisor help Stephen?
4. What can you do as a Unite rep?

|  |
| --- |
| **Stephen** |

**Elect a spokesperson to report back to the main group**

**ACTIVITY 15: Student presentations**

***Learning Outcomes: - Skills required by the union rep 2.1,2.2,2.3***

**AIMS:**  Improve research skills

Practice presenting information to a group

Developing a structured approach to public speaking

**TASK:** At the end of day one you will have been given a topic to research and present to the group. You will have five minutes to present your information. You will then receive questions and feedback from your peers. Provide the sources of information you have used

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| --- |
| Sources of information: |

**Presentation observation sheet**

|  |  |  |
| --- | --- | --- |
| **Name of Presenter:** |  | |
| **Title of session** |  | |
| **Planning and Preparation for the Session:** | | |
| **Opening/Introduction to the Session:** | | |
| **Quality of Communication during the Session:** | | |
| **Did they stick to timings?** | | |
| **Further feedback or developmental comments.** | | |
| **Name of Observer:** | | **Signature of Observer** |

# ACTIVITY 16: Note Taking skills

***Learning Outcomes: - Roles and responsibilities of the union rep 2.1***

***Skills required by the union rep 3.1,3.2 3.3,3.4***

**AIMS:** To improve Note Taking Skills

Be able to identify important parts of verbal text

# RESOURCES See page 204

**Guidance on note tracking**

There is no right or wrong way to take notes. It is up to the writer. We should take them at both formal and informal meetings. They are a valuable resource/skill.

They are a part of your role/function as a rep’. They are there to assist you to pass correct information on to a 3rd party or to members etc. You must deal in the **facts** not the waffle. E.g. dates, times, locations, witnesses or hourly rates, overtime rates, pro rata.

OK to use abbreviations as long as you understand them.

Write up as quickly as possible after the meeting, while information is still fresh.

Pool your notes if necessary.

**Do not rely on the company note taker!!!!!!!!!!!**

**TASK:** The tutor will give a short presentation on the need and value of good note taking. This will include an open discussion within the group.

The tutor will then read a piece of text that you will make notes on. Having completed the listening part of the activity the tutor will ask twenty five questions about the text.

|  |  |
| --- | --- |
| Question | Answer |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
| 6 |  |
| 7 |  |
| 8 |  |
| 9 |  |
| 10 |  |
| 11 |  |
| 12 |  |
| 13 |  |
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| 22 |  |
| 23 |  |
| 24 |  |
| 25 |  |

**ACTIVITY 17: Interviewing Do’s and Don’ts**

***Learning Outcomes: - Skills required by the union rep 1.1,1.2,1.3,***

**AIMS:**  Practiced preparing for an interview

Identified best practice when interviewing members

**TASK 1:**

Discuss the following definition of an interview and give reasons why you agree or disagree with it:

***The purpose of an interview is to extract the optimum amount of information that allows the interviewer to make rational decisions based on the information obtained (in agreement with the member)***

1. List what you should do **AND** should not do

* Before the interview
* During the interview
* After the interview

Decide who will lead your group discussion and who will report back on each part of the task to the larger group.

|  |
| --- |
| **Before The Interview** |

|  |
| --- |
| **During The Interview** |

|  |
| --- |
| **After The Interview** |

# ACTIVITY 18: Interviewing skills

***Learning Outcomes: - Roles and responsibilities of the union rep 2.1***

**AIMS:** Develop interviewing skills.

Get members involved in the process of generating solutions.

**TASK:**

1. Group members should think of grievance cases they know of or have been involved in, noting down the key features.
2. In groups of 3/4 take turns to take the role of the:

* Rep.
* Member with a problem.
* Observer(s).

The rep will interview the member and the observer(s) will take notes in order to provide the rep with constructive feedback. The rep needs to:

* Find out the relevant information.
* Get the member involved in generating a solution or range of options on how the matter might be progressed.

If you have time, when you have finished, you can change roles until everyone has taken the part of the rep at least once.

1. At the end of the interviews the whole group will have a discussion identifying key learning points.

Decide who will lead your group discussion and who will report back on key learning points.

|  |  |
| --- | --- |
| Observer’s report: | |
|  | Give at least one example for each question |
| How well did the Rep put the member at ease |  |
| Encourage the Member to express their views |  |
| Listen to the Member |  |
| Obtain all the relevant information |  |
| Encourage the Member to ask questions |  |
| Identify, discuss and offer solutions to Members barriers/difficulties |  |
| Explained Unite’s role supporting the members |  |
| Give clear guidance where appropriate |  |
| Agree an action plan that both can work to |  |
| Set time scales |  |
| Paced interview for Member |  |
| Clarified and summarised main points |  |

# ACTIVITY 19: Communicating with members

***Learning Outcomes: - Roles and responsibilities of the union rep 2.1 Skills required by the union rep 6.1,6.2***

**AIMS:** Identify various ways to communicate effectively with members

Describe the Pro’s and Con’s of these methods

Use preferred methods to communicate with members

**TASK:** In your teams identify a range of communication methods for both sharing information and gathering members views and issues. Discuss the merits and shortfalls of each of your identified communication methods.

|  |  |  |
| --- | --- | --- |
| **Method** | **Pro’s** | **Con’s** |
|  |  |  |
|  |  |  |
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# ACTIVITY 20: Using the organising cycle to create a campaign

***Learning Outcomes: - Using the organising cycle to prepare and deliver a campaign 2.1,2.2,2.3,2.4***

**Resources:**  *From page 130 of resources*

**AIMS:**  Develop campaign strategies using the organising cycle

Work as a team to create an effective

Develop a variety of communication tools for the workplace

**TASK 1:** The first stage of the organising cycle is to identify issues that your team will campaign on. To do this you will often use a survey to gather employee’s thoughts and feelings.

Your tutor will allocate each team a subject for their survey, so your issue is to create a survey suitable for gathering your colleagues’ views on the subject, so you can identify the next deeply felt, widely felt and winnable issue your workplace team will tackle.

Examples could include any of the following: - Time off to carry out the role, T&Cs, Pay, Redundancy, Grievance, Disciplinary, Training and Productivity, Stress Policy, Night working, Lone working, Meeting the Enforcement Authority, getting a Learning agreement in place, getting a suitable venue on site for learning, talking to course providers, Family Friendly Policies, Flexible Working, Discrimination, Agency/Migrant workers etc.

**This list is not exhaustive and additional examples may well be added by the tutor.**

**TASK 2: Organise**

One member of the team is to lead on this task. You will need to discuss what questions you will need to gather the feelings of your members. Think about the use of open and closed questions (closed questions get you a yes or no answer). How many questions do you need on the survey? Too few and you might not get enough information, too many and people might not want to fill it in.

**TASK 3: Organise**

Now you have the questions you want to ask, think about the survey itself. Using the plan on the following page, outline the tasks you will need to do, who will do them, how much time it will take (be realistic) and how are you going to distribute the survey? (Paper based, face to face questioning or electronic).

Once you have the plan draft the survey, you can do this either by hand or on a computer if you have access

|  |  |  |  |
| --- | --- | --- | --- |
| What needs doing | By Who and by when | Outcome | Further action |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**PLEASE LIST YOUR SURVEY QUESTIONS HERE**

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# ACTIVITY 21: The educate phase of the campaign

***Learning Outcomes: - Using the organising cycle to prepare and deliver a campaign 3.1,3.2,3.3***

**AIMS:** Demonstrate the ability to communicate your proposals to management.

Communicate your strategies clearly to members and colleagues

**TASK 1:** **Educate**

You now have your survey but need permission from your manager to distribute it. To do this your team will need to draft a letter to the manager. Use the page opposite to draft your letter. Think about what it is you are asking for, will you need access to employees to get the survey done, will you need facility time to complete the tasks in your plan and who will need it?

**TASK 2:** **Educate**

You will also need to educate your colleagues about the survey. In your teams develop either a newsletter or poster using one of the template layouts in the appendix of the resource pack.

Things to consider, why is the survey coming out, when and how will people get it? How do they get it back to you and by when? Is there an incentive for people to finish and return the survey? What will happen to the information? These are all questions people may ask or worry about.

**The Action Phase**

The action phase is getting the survey out, assuming you got permission to do all this. We will not be carrying out that phase at this time. Remember though you will need to feedback your findings and your plans to members once your action is complete and that’s a whole new issue!

**DRAFT LETTER**

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# Your workplace projects

On day ten of the course all students will present a 15-minute presentation about a workplace project they have developed during the course. We have outlined some ideas below but these are purely for guidance.

Your tutor will speak to you about your project and how its progressing over the coming weeks and offer any support you feel you might need. You can also speak to other reps at your workplace or your industrial officer to see if there are specific challenges coming up that might fit the bill.

If there are other reps from your workplace on the course you may want to collaborate on a single project. Remember though that this is a team project and tasks and the presentation should be shared, with all team members contributing to the delivery of the final presentation if this is the approach you are using.

**Project ideas**

* Plan for a pay ballot
* Plan for tackling Health and Safety issues or a specific issue at the workplace
* Plan to improve your agreements or gain a new one such as a learning agreement
* Plan an equal pay audit
* Plan an event based on one of the equality events in the year, learning at work day, Workers Memorial Day, black history month or international women’s day.

**What you will need to produce**

* A detailed plan similar to the one you created in activity 22
* A SWOT analysis of your idea
* Any materials or resources needed
* A presentation using PowerPoint
* At least 3 reflective journals charting your progress (see appendix)
* 500+ word essay outlining the project, who you collaborated with and why, the stages your project took, how you monitored or plan to monitor your progress.

**Your tutor will set you a deadline to produce an outline document explaining your chosen project.**

# ACTIVITY 22: Dignity at work, Equality Terminology

***Learning Outcomes: - Dignity and equality at work 1.1,1.2,1.3,2.3***

**AIMS:** To raise awareness of prejudice, discrimination, harassment and bullying and the effects it has on people.

To recognise the importance and benefits of treating people with dignity and respect, and ensure that everyone is treated with dignity and respect at work.

**RESOURCES See page 205**

**TASK:** In your groups discuss the following terminology and come to agreement on what the terms mean to you and your team. Make notes Below and relate to trade union issues in your workplace.

* What do you understand by the word ‘prejudice’?

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| --- |
|  |

* What is ‘discrimination’?

|  |
| --- |
|  |

* Who can be affected by prejudice and discrimination?

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| --- |
|  |

* What do you understand by the term ‘diversity’?

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| --- |
|  |

* What do you understand by the terms ‘equality’ and ‘equal opportunities?

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# ACTIVITY 23: Dignity at work, Issues in your workplace

***Learning Outcomes: - Dignity and equality at work 1.1,1.3,2.1***

**AIMS:** Identify issues in your workplace and look for common themes within your group.

**RESOURCES ;- See page 208**

**TASK 1** In your groups discuss what types of equality and diversity problems you may be faced with in the workplace as a UNITE rep

**TASK 2:** As a group give a definition for the following terms.

Bullying

Harassment

Banter

**TASK 3:** Try to identify if the issues your group identified in task 1 are bullying,

harassment or just banter. Annotate your flip chart accordingly.

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# ACTIVITY 24: Dignity at work, Employment tribunal case study

***Learning Outcomes: - Dignity and equality at work 2.2***

**AIMS:** Identify the potential legal implications of members actions

Using information to guide decision making

**TASK:** Employment Tribunal case study

Working in your groups, your task is to discuss your case. Decide whether you think the Tribunal upheld or dismissed the claim? Give reasons as to why your group made that decision.

Elect a group member to report back for the group.

EMPLOYMENT TRIBUNAL CASE STUDY 1

*Davies v Remploy Ltd ET/2407487/09*

Mr Davies worked as a full-time GMB union steward, and as an employee of Remploy, which provided employment and employment-related services for disabled people. He has mobility problems and is a wheelchair user. On 4 March 2009, the GMB sent a grievance to the company on Mr Davies’ behalf. The grievance alleged that Mr Davies had received evidence that Mr Wellens, a factory manager at the company’s Burnley site, had made insulting and offensive comments about Mr Davies’ disability.

The grievance alleged that Mr Wellens had, on several occasions, in Mr Davies’ absence referred to him as “Ironside”. This was in reference to a popular television series called “Ironside”, about a former police detective of the same name, who used a wheelchair after a sniper’s bullet paralysed him from the waist down. Mr Davies was shocked by Mr Wellens’ alleged comments, and later gave evidence that when he was young he felt bullied when people had called him “Ironside”.

A manager investigated Mr Davies’ grievance and upheld it, but found that there had been no deliberate intention on Mr Wellens’ part to insult or demean Mr Davies or his disability. Mr Davies received a copy of the investigation report, which found that he and Mr Wellens shared a large degree of antipathy towards each other, and that he had called Mr Wellens a “bastard” and said he would “rip his head off and shit down his throat”. Nonetheless, the grievance officer made a number of recommendations for the company, including that all employees be discouraged from referring to Mr Davies as “Ironside”.

Mr Davies’ appeal against the grievance outcome was upheld. The appeal officer found that Mr Wellens’ use of the nickname contravened the company’s bullying and harassment policy, and did cause offence to Mr Davies. He found that Mr Wellens was wrong not only to use the nickname, but also to condone its use at the Burnley site. A general manager apologised to Mr Davies on the company’s behalf, and the company took disciplinary action against Mr Wellens.

Mr Davies brought a claim of disability harassment. The company argued that Mr Davies regularly introduced himself as “Ironside”, and that his use of foul language regarding Mr Wellens meant that he could not have been genuinely offended by the use of the nickname.

EMPLOYMENT TRIBUNAL CASE STUDY 2

*Heafield v Times Newspaper Ltd EAT/1305/12*

Mr Heafield, a practising Roman Catholic, worked as a sub-editor on the Times newspaper. The Times was due to run a story on 12 March 2011 concerning allegations that the Pope had protected a paedophile priest before he became Pope.

This story was referred to in the newsroom as "the Pope". Close to the deadline on 11 March 2011, Mr Wilson, a senior sub-editor, shouted across the newsroom to colleagues to enquire about progress on the story on the Pope. Mr Wilson shouted twice: "Can anyone tell me what's happening to the fucking Pope?"

Mr Heafield, who did not complain at the time, later complained informally to the chief night editor, Mr Pearson, who was unsure of how to deal with the complaint. Mr Pearson asked for advice from a colleague, who told him that he was not worried about what Mr Wilson had said and not to take it too seriously. Mr Pearson, whose opinion was that "these things tended to sort themselves out if left alone", took no further action.

Mr Heafield brought claims in the employment tribunal for religion or belief discrimination, including a claim for harassment in relation to Mr Wilson's question about the Pope.

EMPLOYMENT TRIBUNAL CASE STUDY 3

*Morgan v Halls of Gloucester ET/1400498/09*

Mr Morgan, who is black, worked as a delivery driver in a workplace where swearing was common and little attention was paid to equal opportunities issues.

The employer did have an equal opportunities policy, but this was kept in a filing cabinet and none of the employees or managers knew of its existence.

Mr Morgan resigned and brought a range of race discrimination claims, mostly claiming that he had suffered serious racial harassment. He said that:

* he had been told by another delivery driver who overheard him talking in patois to another black employee, Brian Ennis, to "stop speaking that jungle talk";
* he had overheard in the next room Mr Ennis being referred to as "golliwog Brian";
* as there were two delivery drivers called Brian, one white and one black, Mr Ennis was frequently referred to as "black Brian" to distinguish them; and
* the employer had done nothing to discipline a delivery driver, Mr White, who expressed extreme racist views, including that "black people should be burnt at the stake like Jews", despite an earlier complaint by a Jewish driver.

Various other disputes (about issues such as pay, workload and a written warning) culminated in Mr Morgan resigning.

Mr Morgan subsequently raised a racial harassment claim.

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# ACTIVITY 25: Barriers to learning, engaging and the hidden conversation

***Learning Outcomes: - Roles and responsibilities of the union rep 1.4***

**AIMS:**  Identified barriers to learning for members

Identify reasons why someone might not want to join the union

Identify what someone might be afraid to discuss

Offered practical solutions to overcome such barriers

**RESOURCES See page 242**

**TASK:** Discuss in your groups why members may be unwilling or unable to participate in life-long learning or in the union: You may want to consider the following areas:-

1. Costs

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1. When and where the learning takes place

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1. Difficulties in reading, writing, spelling

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1. Disability

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1. Confidence

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1. Travel

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1. Caring roles (child / elderly relatives with disabilities)

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1. Language

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1. Work Patterns

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1. Any other

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Choose **THREE** of the above and suggest what could be done to overcome them.

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ACTIVITY 26: Family Friendly Rights - Policies

***Learning Outcomes: - Understanding workplace policies and procedures 2.2,2.2,2.3,2.4***

**AIMS:** This activity will help you:

Review the legal rights that employees have in relation to family friendly working.

Identify the key rights that may benefit staff in your own workplace.

**RESOURCES See page 262**

**TASK:** Working in Groups you will be asked to investigate an area of law, which gives employees family friendly rights. Your group will be asked to give a brief presentation to the rest of the course later.

Your presentation should cover the **5 key features** of the issue you choose that you feel will be of interest to Unite members.

1. **Maternity Rights:** Including leave, pay and other rights that employees have when they are pregnant or returning to work following their maternity leave; **Or**
2. **Shared Parental leave**: including leave, pay, eligibility and other rights**; Or**
3. **Paternity and Adoption rights:**  including leave, pay and other rights that employees have when they are returning to work following paternity and adoption leave; **Or**
4. **Flexible working:**  including who has the right to request flexible working, examples of flexible working arrangements, the employer’s duties and the procedure for making a request.

**You will have 45 minutes to prepare your report, and will be given up to 5 minutes to present your findings to the rest of the course.**

Nominate a spokesperson to give your groups feedback

**Resources: TUC Worksmart-**

<http://www.worksmart.org.uk/rights/familyfriendly> work

**Unite Family Rights Guide –**

[**http://www.unitetheunion.org/uploaded/documents/unite%20family%20rights%20guide%20sept1511-24061.pdf**](http://www.unitetheunion.org/uploaded/documents/unite%20family%20rights%20guide%20sept1511-24061.pdf)

**Also found in appendix two of the resource packFAMILY FRIENDLY ISSUE: --------------------------------------------------------**

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| **Key Point 1:** |

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| **Key Point 2:** |

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| **Key Point 3:** |

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| **Key Point 4:** |

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| **Key Point 5:** |

**Presentation observation sheet**

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| **Name of Presenter:** |  | |
| **Title of session** |  | |
| **Planning and Preparation for the Session:** | | |
| **Opening/Introduction to the Session:** | | |
| **Quality of Communication during the Session:** | | |
| **Did they stick to timings?** | | |
| **Further feedback or developmental comments.** | | |
| **Name of Observer:** | | **Signature of Observer** |

**ACTIVITY 27: We don’t do politics here**

***Learning Outcomes: - N/A***

**Aim:** to help us;

Raise awareness of the effects politics and political decisions have on our lives

**Tasks:**

1. Draw up a list of topics within your life (both in work and at home) that are affected by political decisions
2. Choose one example from your home and work lists and explain how politics has affected it.

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**HOME:**

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**WORK:**

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**ACTIVITY 28: Tackling Inequality – truth and lies**

**Learning Outcomes: - Dignity and Equality at work 3.1**

**AIM:**  Understand income inequality

**RESOURCES See page 308**

**TASK:**1 The ‘National Living wage’ for over 25’s was raised to £8.72 in April 2020.

**National National Minimum Wage Apprentice**

**Living Wage 23 + 21-22 18 to 20 16-17 Rate.**

**APRIL 2021 £8.91 £8.36 £6.56 £4.62 £4.30**

**The ‘Living Wage’ (Living Wage Foundation) is £10.85 in London and £9.50 UK as announced in November 2020**

What income would you earn if you worked 37.5 hours? -

* What would your annual income be (37.5 X 52)? -
* What Income would you earn if you worked 40 Hours? -
* What would your annual income be (40 X 52)? **-**

Discuss what you think the minimum annual income level is for the two groups below to be above the poverty line or called the minimum income standard in government circles. *(As highlighted by the Rowntree foundation for 2020).*

Single Person: - Couple with two Children: -

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**TASK 2**

* What legislation ensures you are paid the same as others doing the same job you do?

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* What do you think would be the impact on your members if they found out others were being paid more for doing the same job?

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* What legislation ensures you are paid correctly and are able to what you have been paid?

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* Is there a way to check how much your bosses are paid?

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# ACTIVITY 29: Interviewing skills continued

***Learning Outcomes: - N/A***

**AIMS:**  To practice again skills developed earlier in the course.

Demonstrate sound questioning techniques.

**TASK:** In Pairs each take a turn to find out the following information from your colleague.

NAME

PLACE OF BIRTH

WHAT WORRIES THEM MOST ABOUT BEING A REP

THEIR EXPERIENCE OF DISCIPLINES AND GRIEVANCES

SOMETHING ABOUT THEM NO ONE ELSE KNOWS

# ACTIVITY 30: Knowing your grievance policy

***Learning Outcomes: - Understanding workplace policies and procedures 1.1,1.2,1.3***

**AIMS:**  Encourage reps to become familiar with their company policy

Demonstrate researching skills

**TASK:** In Pairs answer the following questions based on the resources provided for this activity.

Grievance Policy/Procedure, legislation, and the ACAS guide.

1. Does your policy and/or procedure state it aims to comply with the ACAS guide and legislation?
   1. No
   2. Yes

Relevant documents, pages and

Paragraphs\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. The ACAS guide suggests that informal resolution to an issue as the first step – does your policy/procedure support this principle?
   1. No
   2. Yes

Relevant documents, pages and

Paragraphs\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Do you have a statutory right to be accompanied, if so is it in your policy?
   1. No
   2. Yes

Relevant documents, pages and

Paragraphs\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Can an accompanying person (a companion) be?
   1. A TU rep
   2. A work colleague
   3. An official employed by a Trade Union
   4. Anyone of your choosing (e.g., family member or solicitor)
   5. All the above
2. Which of the following is true and where is it stated in your policy/procedure and ACAS guide?

The accompanying individual,

* 1. has a right to address the meeting but cannot answer questions on the worker’s behalf
  2. has a right to address the meeting and answer questions on the worker’s behalf if it is appropriate

Relevant documents, pages and

Paragraphs\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Which of the following is stated in your policy/procedure?
   1. The procedures do not apply where the grievance relates to discrimination, bullying or harassment. In this instance, please refer to the Non-Discrimination Policy or Bullying and Harassment Policy
   2. The procedures do not usually apply where the grievance relates to discrimination, bullying or harassment. In this instance, please refer to the Non-Discrimination Policy or Bullying and Harassment Policy. However, employees may opt to use the Grievance Procedure if they wish.

Relevant documents, pages and Paragraphs

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# ACTIVITY 31: Grievance Case Study

***Learning Outcomes: - N/A***

**AIMS:**  Explore the facts and come to a decision

Give advice to a member

**TASK 1:** Discuss the following information as a group, what is your advice to the member?

‘THE ISSUE’

* a member wants your advice about an issue
* he says his colleague refers to him as ‘daft Richard’
* he says his colleague calls him ‘stupid’ and ‘thick’
* he says he has told him to stop but he ignores his request
* he says he has tried raising it with his shift manager
* he says he waved him away and told him “to grow a pair”
* what do you advise?

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**TASK 2:** Use the format of ‘PIP’ Problem Information Plan to state the problem, state any further information you would need and use the plan to formulate how to represent the member.

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**TASK 3**: Grievance case study and role-play, your tutor will brief you on this activity in full include next steps to be taken.

**ACTIVITY 32; Knowing your disciplinary policy**

***Learning Outcomes: - Understanding workplace policies and procedures 3.1,3.2***

**AIMS:**  Encourage reps to become familiar with their company policy

Demonstrate researching skills

**TASK:** In Pairs answer the following questions based on the resources provided for this activity.

Disciplinary Policy/Procedure, legislation and the ACAS guide.

1. Does your Policy/Procedure state it aims to comply with the ACAS guide and legislation?
   1. No
   2. Yes

Relevant documents, pages and Paragraphs\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Performance issues are not handled under these policy/procedures, but under a Performance Management policy.
   1. True
   2. False

Relevant documents, pages and Paragraphs\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Do you have a right to appeal a disciplinary sanction, if so is it in your policy/procedure?
   1. No
   2. Yes

Relevant documents, pages and Paragraphs\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. For which of the following does your policy/procedure state that dismissal with notice might be appropriate?
   1. The employee has not committed gross misconduct but has, over a period of time progressed through the various stages of the disciplinary procedure, but with no improvement in conduct
   2. An employee has committed a less serious act of misconduct but already has a current warning on their file for conduct
   3. An employee has committed an act of gross misconduct
   4. All of the above
2. Does your policy/procedure and/or the ACAS guide state that the employee should be informed or advised of the nature of the allegation and the possible outcome?
   1. Yes
   2. No

Relevant documents, pages and Paragraphs\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. What is the normal duration of warnings for a:
   1. Formal Verbal Warning \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. Written Warning \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   3. Final Written Warning \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# ACTIVITY 33: Disciplinary Case Study and Role-play

***Learning Outcomes: - N/A***

**AIMS:**  Explore the facts and come to a decision

Give advice to a member

Take part in the disciplinary process

**TASK 1:** Your tutor will outline the activity to you and explain fully what is required.

# ACTIVITY 34; Negotiation skills where are at?What is your experience

***Learning Outcomes: - Roles and responsibilities of the union rep 2.1 Skills required by the union rep 7.1,7.2,7.3***

**AIMS:**  To identify negotiating experiences of delegates

**TASK 1:** The tutor will go around the room asking attendees to introduce themselves in an informal manner; the aim is to determine what experience the participants have in the field of negotiation.

Think outside of the usual trade union sphere and include any other types of negotiations you may have been involved in:

* What is your experience of negotiation on a scale of 1 to 10? (With 1 representing, very little and 10 representing, skilled negotiator)
* How successful have you been at negotiations in the past?
* What do you feel are your strongest areas as a negotiator?
* What areas of negotiation would you like to sharpen up?
* Give examples of scenarios where negotiating skills would be used in the role of a Workplace Rep, Health and Safety Rep, Union Learning Rep and Equalities Rep.

# ACTIVITY 35: Negotiation skills practice

***Learning Outcomes: - N/A***

**AIMS:**  To practice your negotiating skills

**TASK 1:** The tutor will split you into negotiating teams and brief you on the scenario you will be addressing.

**Preparing your case**

Your tutor will split you into two groups: - Trade union & Management sides. In your groups you should prepare your plan for negotiating~~; think about-~~ include:

* The key points of the issue
* What information you will need to argue your case
* Goals which you wish to achieve
* The skills you will need to be an effective negotiator

In your groups ensure you allocate roles and tasks to each member of the group e.g. chair, note taker or any other positions you wish to have

Prepare and record your plan to present and negotiate your case with the other side

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# Day Ten: Presenting your workplace projects

Reflective learning journal one

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| **The main points I have learnt from today:**  uniteLogo |
| **How I could develop my practical skills as a result of today:**  **`** |
| **How I would develop my knowledge and understanding of my new role as a result of today’s learning:** |

Student signature: …………………………………………. Date: …………….....................

Reflective learning journal two

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| **The main points I have learnt from today:**  uniteLogo |
| **How I could develop my practical skills as a result of today:**  **`** |
| **How I would develop my knowledge and understanding of my new role as a result of today’s learning:** |

Student signature: …………………………………………. Date: …………….....................

Reflective learning journal three

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| **The main points I have learnt from today:**  uniteLogo |
| **How I could develop my practical skills as a result of today:**  **`** |
| **How I would develop my knowledge and understanding of my new role as a result of today’s learning:** |

Student signature: …………………………………………. Date: …………….....................

**LEARNWITHUNITE TEAM**

# ACTIVITY: Using education to organise in your workplace

**Aims:** To help us -

* Use education to organise workers.
* Communicate with workers
* Recruit members using education as a member benefit
* Discuss how education can develop members, support member and develop Unite [[1]](#endnote-2)Representatives of the future.

**TASK 1:**

What can you tell us about Unite Education?

Where would you go to find education opportunities?

What support is available to member for example those who are at risk of redundancy?

**Task 2:**

In your groups discuss:

How would you use education to promote Learning as a benefit to members?

How is Learning a force for good in your workplace and surrounding communities?

How can education be used to recruit members?

How education can develop you and your fellow reps on site?

**For each task decide who will lead your group discussion and who will report back to the larger group.**

1. [↑](#endnote-ref-2)