



Developing and supporting workplace representatives

A guide for branches





Message from the General Secretary

At National Delegate Conference 2009, conference passed a motion establishing that branches should set up a scheme to develop and support activists via a mentoring scheme or equivalent.

Developing and supporting activists is a crucial role for all UNISON branches. With all the other pressures on UNISON members and reps, it is easy for reps to become inactive, or to attend a training course and then never find the time or the opportunity to put their actions into practice. But in the current climate our activists are more important than ever, so UNISON has developed new, straightforward resources and training to encourage reps to get active and to help branches work effectively with reps.

This guide sets out some options for how you can most effectively support reps in your branch, in line with our key message to activists:

- UNISON values the contribution of every workplace representative. UNISON is committed to providing development opportunities to enable you to fulfil your role effectively, including providing you with a named contact who can point you in the right direction to help you in your role.

These opportunities are designed to benefit you as an individual and as part of a collective organisation.

- UNISON asks reps to be proactive in finding opportunities to put into practice new skills introduced on training courses and in line with your union role. This means following up on agreed actions and seeking out information and support to enable you to carry out your role effectively.

Our objective is to ensure that we have reps who are trained and active across every workplace where there are UNISON members. We hope this guide, along with Utrain, your regional education programme and the support and enthusiasm of organisers in your region will help us achieve that goal ✔



Dave Prentis

Contents

Why is it important to develop and support workplace representatives?	6
Key steps to get you started: ideas for branch officers	7
An informal buddy system	9
A more formal mentoring scheme	11
Skills for mentoring	14
Practical ideas to encourage reps to become more active	16
Useful documents	18
● Buddy or mentor diary	18
● Checklist for setting up a buddying or mentoring scheme in your branch	19
● Checklist: getting started as a mentor	20
● Sample mentoring agreement	21
● Trained and Active Plan	28
● Record form for catch up with named development contact	29

Acknowledgements

Thanks to the following branch secretaries and branch education co-ordinators who have provided information about their experiences of setting up buddying and mentoring schemes in UNISON branches.

Lesley Barrett

Liverpool Community Hospital branch

Paul Farley

Cambridge Police branch

Sharon Otto

University Hospitals Birmingham branch

Kevin Tanner

Bristol Local Government branch

Why is it important to develop and support workplace representatives?

UNISON reps are crucial to the effectiveness of UNISON. UNISON is absolutely committed to supporting reps through the provision of first class training and resources. The next step is for branches to encourage both new and existing reps to:

- take full advantage of these training opportunities
- make it as easy as possible to put what they learn into practice.

Challenges for public services

Public service workers are facing difficult challenges. UNISON needs to be organised and prepared to defend members' interests, and to promote the value of public services and the work our members do. This means making the most of the stewards, health and safety, learning and equality reps we already have, and showing to potential reps and members that UNISON really does value workplace reps.

Our reps make the difference!

Members and potential members say that where there is a respected and active UNISON representative in a workplace, it makes them more likely to join UNISON and stay involved in the union.

Promote organising in branches

The most effective way to encourage organising in branches is through direct support to reps from branch secretaries and stewards (Organising in UNISON, 2006). Organising in UNISON means encouraging members to get involved around issues, and recruiting and involving members in a systematic way. Research has shown that where workplace reps use organising techniques such as branch mapping, branches are much more likely to grow.

Help with case work

Branches who have tried out mentoring and buddying schemes have found that it had a positive impact on case work, by involving more workplace reps in supporting members in grievance and disciplinary cases. This spreads the load and develops expertise and confidence in UNISON reps.

“As a consequence of this system we have a number of reps who are now successfully running with cases from start to finish.” Branch secretary

Workplace reps are often isolated

Reps are often isolated, either because they are the only UNISON rep in a workplace or because the workplace itself is cut off from the rest of the branch – in a care home, a school, a small voluntary organisation or a doctor's surgery for example. Not surprisingly, it is easy for isolated reps to become burnt out or disillusioned. UNISON absolutely relies on volunteers such as these – branches owe it to them to offer as much practical support as possible! ✓

Key steps to get you started: ideas for branch officers

Records and systems

Make sure you have an accurate and up-to-date record of all your workplace representatives, including stewards, contacts, health and safety, learning and equality reps, and the training they have completed. This is important so that reps can be encouraged to attend appropriate training and to ensure that stewards have the necessary Employment Rights Act (ERA) accreditation.

Joint branch and regional assessment

Work with your regional organiser to complete your annual assessment and put steps in place to carry out the follow up activity. This will address some of the key building blocks to supporting and developing activists.

Branch education co-ordinator

The role of branch education co-ordinator is a crucial one. If there isn't one in your branch, encouraging someone to take on this role is an essential first step. The branch education co-ordinator will help to support and develop reps, for example by:

- making sure all new reps receive relevant initial information about the branch and their role
- publicising the range of educational and training opportunities available to members and activists and making sure that all reps go on appropriate training courses
- negotiating with the employer, along with union learning reps, on issues relating to learning including time off
- talking to existing reps about their ongoing training and development needs
- supporting and co-ordinating the work of buddies and mentors in the branch (i see pages 9 and 11).

Practical tasks

Identify practical tasks reps can get involved in, and ask for their help. Have a look at the ideas (i see page 16) on how to keep track of what you have asked reps to do.

Support for new reps

Make sure that each new rep has a 'named contact', a buddy or mentor who will have a chat with them regularly to find out what training and support they may need and to catch up on how their role is progressing.

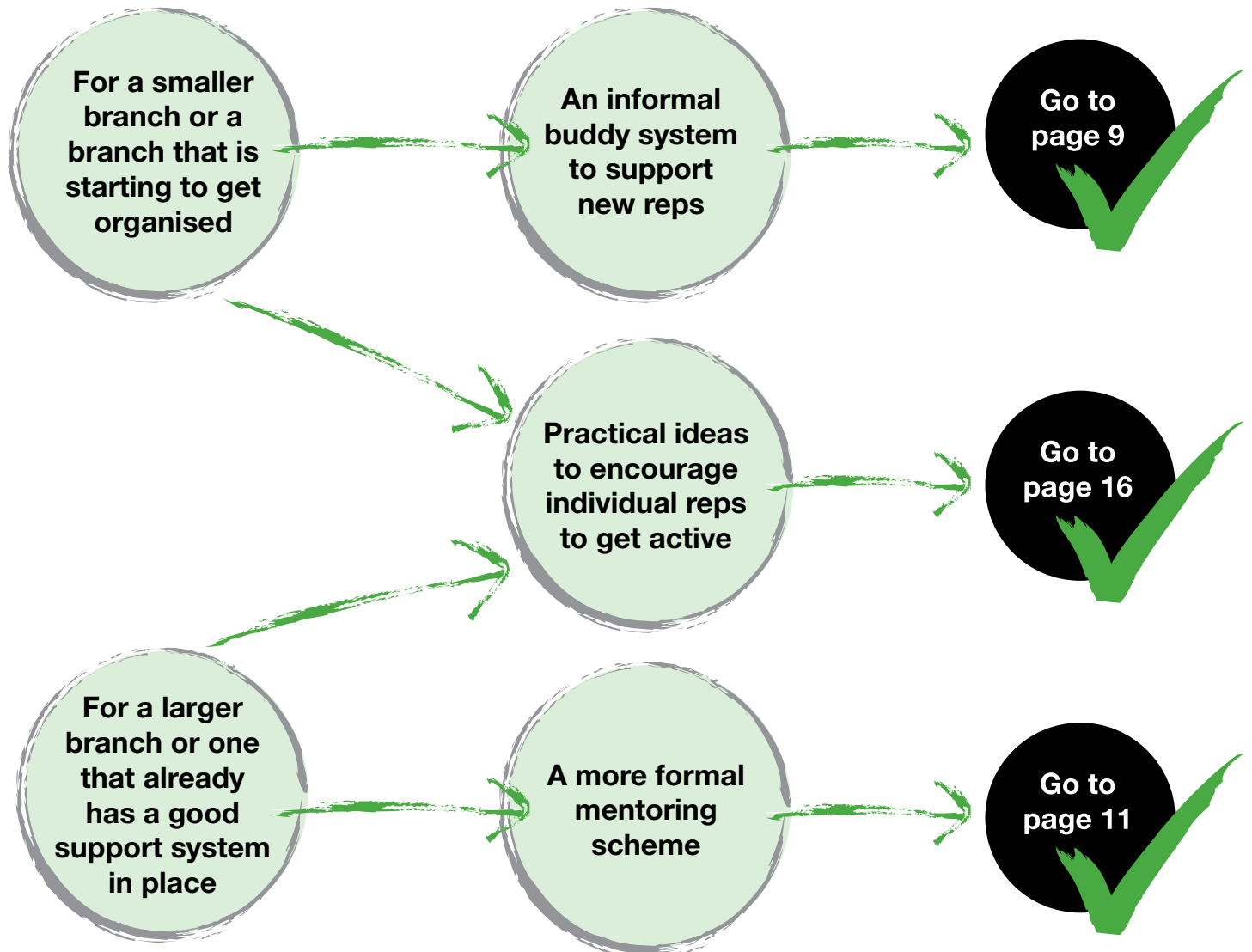
Regular catch-ups with existing reps

Arrange for regular catch-ups with existing workplace reps over a period of time, especially where they have not been active in the past or have recently completed training courses.

Over time, aim to ensure that all reps in the branch have the opportunity for a twice yearly catch-up with a named contact, which could be the branch education co-ordinator or a trained mentor. (i See page 29 for an outline you can use for these catch ups ✓

A named contact, buddy or mentor?

Different branches will have different approaches to this. Find out more about how it could work:



An informal buddy system

What is a buddy?

A buddy could be any existing rep or branch officer who has completed the appropriate training and who is experienced, eg in casework, representation and recruitment. For new health and safety, learning and equality reps the buddy could be a more experienced rep in the same role, or the relevant branch officer.

What can a buddy do?

- Work with the new rep to fill in the Trained and Active planning form (TAP form) (i see page 22) and keep in close contact with the branch education co-ordinator.
- Go with the rep to branch committee meetings and make sure they meet branch officers and other reps.
- Arrange briefings on employer policies and procedures.
- Signpost the new rep to the relevant branch officer to help with specific issues.
- Organise 'shadowing' opportunities.
- Offer a listening ear and help point the new rep in the right direction.
- Get the new rep involved with practical tasks and activity (i see page 16)

"The main reason for the buddy system was to ensure that new stewards felt supported while learning how to do sick reviews building up to grievances and disciplinary"
(Branch education co-ordinator, health branch).

Where does the branch education co-ordinator fit in?

The role of the education co-ordinator will vary, but will include:

- keeping confidential records of completed Trained and Active Planning forms and sometimes working through the form with new reps
- organising training for new reps
- co-ordinating the work of buddies and offering them support, including the opportunity to network, advice on where to meet, and access to relevant information
- making sure the new rep has a 'named contact' for twice yearly catch ups once the buddying has finished.

For how long should you 'buddy' a new rep?

There is no fixed timescale for the period in which a buddy will be supporting a new rep - it will depend on experience, knowledge and confidence of the new rep.

- It is especially important for the buddy to catch up with the new rep regularly as they begin their role and after training, to assist the new rep with follow up actions
- Any buddying agreement should have an agreed end date which should be reviewed and adjusted as required.
- Right from the outset of a buddying scheme, a buddy should be preparing the new rep to be less and less reliant on his/her buddy.

Training from UNISON on buddying and mentoring

- For branch secretaries - branch leadership development programme
- For branch education co-ordinators - revised branch officer training
- For buddies - half day buddy workshop (can be run in branches)
- For mentors - mentoring in the UNISON branch course. The course is designed to be used as part of branch development. There is a one day version which can be run with anyone interested in setting up a mentoring scheme. The two day version also focuses on developing the skills of mentors
- For more information, contact your Regional Education Officer on 0845 355 0845 ✓

How has it worked in practice?

Encouraging reps to take on case work

“When we receive a case file from a member it is allocated to a workplace representative and an experienced branch officer to oversee progress.

The workplace rep will carry out all necessary actions with the experienced officer acting as a mentor/guide. This has enabled us to bring on reps and utilise the knowledge and skills of the more experienced reps. As a consequence of this system we have a number of reps who are now successfully running with cases from start to finish.

The next stage is to introduce a formal mentoring scheme. Because of the difficulties in getting staff released in sufficient numbers we have submitted a regional pool bid to facilitate the running of the national mentoring training for all six police branches. This was agreed, and plans are now afoot to arrange this training”.

Branch secretary, police branch

“The main reason for the buddy system was to ensure that new stewards felt supported whilst learning how to do sick reviews building up to grievances and disciplinaries. I show them how the investigation is done and how to write a statement of case, they then accompany me in the case.

The Trust did challenge the right for them to come in but they came in as secretarial support and therefore they were allowed. This has also been used for long time reps who wish to become more active.”

**Branch secretary,
health branch**

A more formal mentoring scheme

What is the difference between a buddy and a mentor?

There are lots of similarities between buddies and mentors. However, in addition to offering support and encouragement to new reps, mentors are also trained to help with problem solving and coaching reps through difficult situations.

Mentors need to understand the branch's priorities as well as supporting the development of individual reps. Mentors can therefore be part of a whole branch approach, encouraging existing activists and members to become active and engaged around agreed branch and union priorities.

How can a branch use trained mentors?

There are lots of ways branches could use mentors:

- as buddies to help new reps get started (i see page 9)
- to offer support to existing reps who are developing new skills in areas such as negotiations and more complex representation cases
- to help ensure that reps understand UNISON's priorities and work within agreed branch protocols
- to act as a sounding board to branch officers
- mentoring training focuses on listening and questioning skills which are useful for all branch officers.

"Allocating a newly elected rep with a mentor has helped a lot to keep the new rep involved in the gap between being elected and being trained". (Branch education co-ordinator, local government branch).

Who could train as a mentor?

Any experienced branch officer or senior rep who has been approved by the branch could train as a mentor.

"This role needs to be done by someone who is interested in education and understands aims and objectives, because the new steward needs to know what their goal is and the mentor needs to understand what it is the new steward should be able to do." (Branch education co-ordinator, health branch).

"Should have at least three years experience as a rep, and must be willing to attend regular update training" (Branch secretary, local government branch).


What is the role of the branch education co-ordinator?

As with buddies, the branch education co-ordinator will have an important role in co-ordinating the activity of mentors in the branch, for example in allocating mentors to new or existing reps.

"As education co-ordinator I meet with the new steward and the mentor regularly. The notes from this development chat are then put the steward's development folder...The co-ordinator for the mentors needs to be committed and also have the time to keep mentors engaged in the process." (Branch education co-ordinator, health branch).

"The role of the branch education co-ordinator is to support the mentor with the long term view of developing the new steward as a future branch officer" (Branch education co-ordinator, Local government branch).

Some key principles for branches wanting to set up a mentoring scheme

- A branch based mentoring scheme will be much more effective if all branch officers are supportive and aware of the role the mentors will play, so it is recommended that the branch committee is involved in working out how best to set up a mentoring scheme.
- A mentoring scheme is not just about developing individual reps. It is also about helping ensure a consistent approach across the branch, for example in relation to how case work or organising is handled.
- It will be important to agree as a branch some general guidelines for mentors and reps, including on issues such as:
 - purpose of the mentoring scheme
 - confidentiality
 - what should be in a mentor agreement
 - how to deal with any problems
 -  See pages 19 - 21 for relevant checklists.


UNISON's approach to mentoring

'Mentoring' means different things to different people. UNISON's approach is that mentors:

DO: listen; use their experience to signpost reps towards key officers or sources of information; use questioning skills to help a rep examine a problem and explore options; encourage reps to take up and put into practice learning opportunities; operate in a framework agreed by the branch committee; offer regular support for an agreed, fixed time period.

DO NOT: replace branch officers. The mentor won't deal with specific issues which branch officers would normally handle; have to know all the answers; tell reps what to do; know all the answers to questions reps might ask; act as counsellors.

Training from UNISON on buddying and mentoring

- For branch secretaries - branch leadership development programme
- For branch education co-ordinators - revised branch officer training
- For buddies - half day buddy workshop (can be run in branches)
- For mentors - mentoring in the UNISON branch course. The course is designed to be used as part of branch development. There is a one day version which can be run with anyone interested in setting up a mentoring scheme. The two day version also focuses on developing the skills of mentors
- For more information, contact your regional education officer on 0845 355 0845 

How has it worked in practice?

“We wanted to try out a mentoring scheme because our quarterly stewards support group was not working, as people couldn’t attend because of work pressures.

Our new stewards are given the contact number of an officer, who they can ring anytime for advice. The new steward then shadows the officer and discusses afterwards what they learnt and observed. The new steward is given easier stuff to start with, such as sickness interviews, and they then have a meeting with the mentor around what they have done, how they handled things, what their fears were, what worked well.

In our scheme, the mentors are the more experienced officers of the branch who had enough release to give the new steward time to shadow them and then assess them whilst they were doing things.

The person I mentored says they could not have done it without me, and another new steward has grown in confidence and is now doing other things within the branch including project work.”

**Branch education co-ordinator,
health branch**

“We have agreed a set of protocols on how to involve new stewards, what the rep can expect and the role of the mentor. It starts with sending out a letter as soon as they are elected. What used to happen was that once stewards were elected they sometimes had to wait quite a long time for the training and they often got disillusioned by the time the training came round and they often didn’t end up going on it. Since we started the scheme, we have consistently filled the training courses, with 13 stewards from our branch alone on the last course – in the past we only sent two or three stewards on the training.

Some of the things we do are to invite new stewards to branch meetings and explain how the meeting works, and the jargon, and to make sure they have all the information they need in advance of the training.

We are now monitoring whether they are active after the training. So far we have seen that the rate of retention of stewards is much higher and stewards are more active, plus we have new stewards on branch committees.

The next step is to use the same approach with union learning reps, which we are now starting.”

**Branch education co-ordinator,
local government branch**

Skills for mentoring

The following extract from *Jenny Rogers: Coaching Skills a Handbook*, Open University Press (2004) sets out some useful ideas about questions, especially where there is a dilemma or a problem a rep needs help with.

Effective questions

The most effective questions have a number of characteristics in common:

- they raise the client's self-awareness by provoking thinking and challenge
- they demand truthful answers by cutting through obfuscation and waffle
- they are short
- they go beyond asking for information by asking for discovery
- they encourage the client to take responsibility for him or herself
- they stick closely to the client's agenda
- they lead to learning for the client
- they are more than likely to begin with the words 'what' or 'how'.

Some super-useful questions

1. What's the issue?
2. What makes it an issue now?
3. Who owns this issue/problem?
4. How important is it on a 1-10 scale?
5. How much energy do you have for a solution on a 1- 10 scale?
6. What have you already tried?
7. Imagine this problem's been solved. What would you see, hear and feel?
8. What's standing in the way of that ideal outcome?
9. What's your own responsibility for what's been happening?
10. What early signs are there that things might be getting better/going all right?
11. Imagine you're at your most resourceful. What do you say to yourself about this issue?
12. What are the options for the action here?
13. What criteria will you use to judge the options?
14. Which option seems the best one against those criteria?
15. So what's the next/first step?
16. When will you take it? ✓

The **GROW** model

The GROW model is used widely in mentoring, especially where a mentor is working with a rep to decide on steps to tackle a problem or to encourage their development.

Mentors will not necessarily follow each step exactly – there are different places where the rep is likely to want to start the discussion, and the mentor and rep might find it easier to move between the steps depending on the discussion. Each step will need to be covered at some point in the discussion however.

The two day mentoring in your branch course gives trainee mentors the change to try out this model and other approaches to mentoring.

Establish the **Goal**:

First you must define and agree the goal or outcome to be achieved. You should help your rep define a goal that is specific, measurable and realistic.

In doing this, it is useful to ask questions like:

- How will you know that you have achieved that goal?
- How will you know the problem is solved?

Examine current **Reality**:

Next, ask your rep to describe their current reality (situation). This is a very important step. Too often, people try to solve a problem without fully considering their starting point and often they are missing some of the information they need to solve the problem effectively. As the rep tells you about his or her current reality, the solution may start to emerge.

Useful mentoring questions include:

- What is happening now?
- What, who, when, how often?
- What is the effect or result of that?

Explore the **Options**:

Once you and the rep have explored the current reality, it's time to explore what is possible - meaning, all the many possible options you have for solving the problem. Help your rep generate as many good options as possible, and discuss these.

By all means, offer your own suggestions. But let your rep offer his or hers first, and let him or her do most of the talking.


Typical questions used to establish the options are:

- What else could you do?
- What if this or that constraint were removed?
- What are the benefits and downsides of each option?
- What factors will you use to weigh up the options?

Establish the **Way** forward:

By examining current reality and exploring the options, the rep will now have a good idea of how he or she can achieve their goal. Your final step as mentor is to get your rep to commit to specific action.

Useful questions:

- So what will you do now, and when?
- What could stop you moving forward?
- And how will you overcome it?
- Will this address your goal?
- How likely is this option to succeed?
- What else will you do? 

Practical ideas to encourage reps to become more active

A common complaint from reps is that they are not sure what they should be doing, or how to get started. In these situations, a direct approach from a branch officer or experienced rep can be very helpful.

- Have a list of practical tasks already worked out, so that you can immediately make a suggestion about something the rep can get on with. The tasks within the Trained and Active Planning (TAP) form can be helpful here.
- Make sure the task is well defined and relevant, and make it easy for the rep to get started. For example, you could say: "I've got the branch membership survey here. Please can you talk through the survey with five or six members this week? If you could talk to x, y and z in your department that would be great."

This takes organisation, but you've got your rep off the ground and visible in the branch from the start. A task like this also demonstrates that building the branch is an important role for workplace reps.

- Make a note of what you have asked the rep to do and when you will follow it up. This is crucial, because it demonstrates that the task was a useful one and that you have a genuine interest in the rep's development.
- Think about suggesting activity which gradually increases the confidence and experience of the rep. Use the 'activist development planning' form below to help you think about where the rep is now and the skills and knowledge they need to acquire over a given time period.

"The new steward is given easier stuff to start with, such as sickness interviews"

"The steward I mentored has grown in confidence and is now doing other things within the branch"

- Make sure you acknowledge and thank reps for the work they have done. There is nothing like being appreciated! 🟢

Activist development planning form

Name of activist

Where is (name of activist)
now, in terms of skills, experience etc

A

Where do you see (name of activist)
being in three months?

B

Development plan: moving a rep from A to B

Write down when will you meet and what tasks can you get the rep involved in over a three month period.

When/where will you meet the rep?

What task will you give them? Start small!

✓ Checklist for setting up a buddying or mentoring scheme in your branch

Tasks	Comments
Discuss and agree the next steps for establishing a mentoring or buddying scheme in your branch:	
✓ Have you agreed the structure for the scheme? <ul style="list-style-type: none"> ● Who will do what ● How you will keep in touch ● Who will take responsibility for the scheme in the branch 	
✓ Have you an agreement and protocols which fit your needs?	
✓ How will you select your buddies/mentors?	
✓ Who will you offer support to? (eg. new reps, inactive reps, all reps etc)	
✓ How will you match buddy/mentor and reps?	
✓ What training will be needed for either or both?	
✓ What support will you offer to buddies/mentors?	
✓ Who will arrange this?	
✓ How will you monitor how things are going?	

✓ Checklist: getting started as a mentor

Getting started as a mentor	Comments
✓ What are your next steps?	
✓ Are you clear about the following: <ul style="list-style-type: none"> ● What your role is? ● The outline of an agreement to discuss with whoever you are mentoring? ● How often you will have contact? ● When the mentoring will come to an end? ● Where to go if there are questions you can't answer? ● How to contact your rep? ● Where to get support yourself? 	
✓ How will you keep track of your discussions?	
✓ How will you deal with issues of confidentiality?	

Model ground rules for mentoring

At the first session you should make an agreement with your rep that sets out arrangements for mentoring meetings and expectations on both sides. A suggested agreement, which can be amended or added to, is set out below.

The agreement should establish:

- that mentoring is a mutual process
- the start and finish of the mentoring period and approximate length of each mentoring session
- that milestones/goals and the Trained and Active form for the rep will be agreed at the first session and reviewed at each mentoring meeting
- that mentoring meetings are confidential and only where agreement is given should matters be shared with others - this includes safe keeping of records of meetings
- how mentoring meetings will be conducted eg face-to-face and/or by phone.
- how differences will be settled.

Confidentiality and data protection

To comply with data protection legislation, mentors need to ensure that confidential information such as notes of mentoring meetings are stored securely where other people do not have access to them ✓

Sample mentoring agreement

We agree:

- To work together in line with the ground rules agreed
Mentoring support will be provided for (state time) initially.
- To keep a record of mentoring meetings so that progress can be monitored and to store the confidential notes of those meetings securely.
- For telephone meetings, (name)..... will phone
(name)..... at the pre-agreed time, and
(mentor) will make notes and email/send them to
(rep) to agree.
- Telephone numbers
- To discuss and draw up a TAP form at our first meeting and review it at subsequent meetings.
- To respect the confidentiality of these meetings and only to share matters with others where agreement is given and noted on the record form.

Any additional points

-
-
-
-
-

Mentor's signature Date

Rep's signature Date

Trained and Active Plan

As a new workplace rep, UNISON is committed to supporting your training and development. Your branch will help you get on the relevant training courses and will allocate you a named contact who will be able to:

- answer your questions
- put you in touch with the information and people who can help you along the way
- have a regular catch up as you become more active in the union.

Your contact could be a branch officer such as the branch education co-ordinator or an experienced steward. In larger branches, it may be a UNISON activist who has trained as mentor or a buddy.

UNISON also asks you to be proactive in seeking out opportunities to put your training into practice.

To get started, sit down with your contact in the branch and complete this short questionnaire together. There is space here for you to come back to each point later on so you can make a note of how things are going in each key area.

About me

Name

Membership number (useful to note as you will need this eg for course applications)

.....

Branch

The members I represent are based in the following workplace(s)

.....

.....

.....

Other

Important information and contact details

My branch secretary name and contact details

Tel

Email

My branch contact or mentor and details

Tel

Email

Other key contacts

Name:

Tel


Email

Tel

Email

Tel

Email

 Tick in the box when you can say 'yes' to the following:

I've got a copy/copies of:

Notes

<input type="checkbox"/> The Code of Good Branch Practice	
<input type="checkbox"/> UNISON Rule Book	
<input type="checkbox"/> Recent branch newsletters	
<input type="checkbox"/> Branch equality policies	
<input type="checkbox"/> Dates for branch committee and other relevant branch meetings in diary	
<input type="checkbox"/> Dates for training over the next year in diary	
<input type="checkbox"/> Information about UNISON's national and regional website	
<input type="checkbox"/> UNISON application forms	
<input type="checkbox"/> Names and contact details of branch officers and reps	

Trained and Active planning form

Use this plan as part of regular catch-ups with your branch contact. There are some general roles for all reps, and then some more specific ones for stewards, health and safety reps, union learning reps and equality reps.

Actions can be what you will do next under the relevant heading, or what you agree to do to help you feel more confident in a particular area. You don't need to fill them all in to start with – and remember, there is lots of training available to help you carry out the roles of a UNISON workplace rep.

Right now, how confident do I feel about carrying out the following roles?

Please tick box or write in box as appropriate

	I feel confident about this	I feel quite confident	I don't feel confident right now	Action agreed at first meeting with your contact. Date:	Done! Date when completed	Update and follow up actions at 2nd meeting. Date:	Done!
Talking regularly with members and potential members							
Keeping noticeboards up to date							
Talking through a problem at work with a member							
Keeping in contact with lead branch officer or convenor							
Handing out information to members							
Reading and passing on information that is sent to me by the branch							

Right now, how confident do I feel about carrying out the following roles?

Please tick box or write in box as appropriate

	I feel confident about this	I feel quite confident	I don't feel confident right now	Action agreed at first meeting with your contact. Date:	Done! Date when completed	Update and follow up actions at 2nd meeting. Date:	Done!
Talking to potential members about joining UNISON							
Talking to a manager about a member's issue							
Carrying out a survey with members							
Organising a meeting of members							
Recognising what could be equality issues							
Using the internet and email to keep up to date on relevant UNISON issues							

Right now, how confident do I feel about carrying out the following roles?

Please tick box or write in box as appropriate

	I feel confident about this	I feel quite confident	I don't feel confident right now	Action agreed at first meeting with your contact. Date:	Done! Date when completed	Update and follow up actions at 2nd meeting. Date:	Done!
Additional points for stewards:							
Representing a member at a grievance or a disciplinary							
Supporting a senior steward at a grievance or disciplinary							
Getting involved with branch level activity or campaigns							
Keeping an up to date workplace 'map'							
Encouraging others to become more active							

Right now, how confident do I feel about carrying out the following roles?

Please tick box or write in box as appropriate

	I feel confident about this	I feel quite confident	I don't feel confident right now	Action agreed at first meeting with your contact. Date:	Done! Date when completed	Update and follow up actions at 2nd meeting. Date:	Done!
Additional points for union learning reps:							
Giving support to members getting involved in learning for the first time							
Asking questions to help find out what a member's training needs might be							
Talking confidently about skills for life issues							
Additional points for health and safety reps:							
Raising health and safety issues with the relevant person							
Organising a health and safety inspection							
Talking confidently about risk assessments							

Right now, how confident do I feel about carrying out the following roles?

Please tick box or write in box as appropriate

	I feel confident about this	I feel quite confident	I don't feel confident right now	Action agreed at first meeting with your contact. Date:	Done! Date when completed	Update and follow up actions at 2nd meeting. Date:	Done!
Additional points for equality reps:							
Talking confidently about types of discrimination							
Identifying good and bad practice around equalities in the workplace							
Asking questions to help find out what a member's equality issues might be							
Knowing who else to work with in the branch on equalities issues							

Record form for catch up with named development contact

Workplace rep name

Contact name

Date

How have things gone since we last met?	Follow up action – by when
What went well?	
What hasn't gone so well?	
Any queries or problems and what can be done about them?	

Record form for catch up with named development contact — continued

How have things gone since we last met?	Follow up action – by when	
Review of action agreed last time – how did it go?	Any follow-up action	
What is coming up next and what help and support might you need?	Any follow-up action	
Review of Trained and Active plan (for new reps)	Action	
Date and venue of next meeting:		
Signed: (Rep)	(Development contact)	Date

Designed, published and printed by UNISON, 1 Mabledon Place, London WC1H 9AJ. CU/March 2010/19013/2883/UNP 11044.