



REP'S

HANDBOOK

GIVING YOU THE EDGE

	1
	2
	4
	9
	12
	14
	16
	17
	19
	21
	23
	24

This handbook is an introduction to the role of a Prospect representative. It provides the basic information that reps need to make the most of their role within Prospect.

You may be reading this after having been elected or appointed as a new representative, or you may just be thinking of stepping forward and becoming active in the union. Either way we hope you will find the handbook useful.

As a trade union, Prospect is an organisation that relies on volunteers – its representatives – for the majority of its activities. Prospect has over 4,000 reps and just 150 paid staff. It is often said that a union is its members, and this is, of course, true.

But it is just as meaningful to say that a union is its representatives: the active members who give their time to protect and advance the interests of their colleagues at work and in wider society. Without you, we would not be able to do the work and to provide the service that we do.

To the uninitiated, the union's structures and procedures may seem quite confusing. This handbook and the accompanying material in the *Prospect Rep's Toolkit* are intended to help you find your way through the maze.

But don't let all that put you off! It should also provide you with the information you need to work out where your role fits in and how and where you can find the support you need to serve your members effectively.

It is intended to be a starting point rather than a guide to every aspect of being a rep. We provide an ever-expanding range of resources for reps (see chapter 7) and you are encouraged to acquaint yourself with this material.

If you have any questions which the handbook does not answer please contact either the education unit (education@prospect.org.uk) or the Recruitment, Organisation and Members' Services (ROMS) department (roms@prospect.org.uk).

1

At the most basic level a rep is a link between: members and other levels of Prospect members and management.

At the other end of the spectrum a rep might organise meetings, handle personal cases and negotiate pay.

Between the two extremes are a number of other roles, all of them making an important contribution to the union's work.

We are always conscious that reps are volunteers. Some can only give a little, others can give a lot. Each person must find their own boundaries. But to most people, the role of a local representative includes these elements:

Advice: Someone members can turn to for advice about what is happening in the workplace – not necessarily able to answer all the questions but knowing where to look to find the answers.

A shoulder to cry on: Someone they can talk to even if they don't need further help.

Representation: Someone to stand by their side when they need it.

Advocacy: Someone to speak on their behalf.

Negotiation: Someone who can help improve their local working conditions.

Consultation: Someone who management will speak to in order to learn the views of staff and their contribution to proposals for change.

Knowledge and understanding: Someone prepared to give an honest assessment of what is happening in the workplace.

Recruitment: Someone who can persuade their colleagues to join the union so they can benefit from collective organisation.

Organisation: Someone who can organise their colleagues so they improve their bargaining power.

Liaison: Someone who is prepared to liaise with a group of members, passing information upwards and downwards

Democracy: Someone who represents members' views in developing the union's policies and ensuring that the union's leadership is responsive to members' wishes.

Some reps can only fulfil one of these functions. Others, with experience and the appropriate support from Prospect, can fulfil all of them. It is for you to choose the level of your involvement.

The answer depends on you. The more you are prepared to do, the more time and support you will need. But as a rep you will have certain rights to time off for union activity.

Recognised union representatives have a legal right to reasonable paid time off from employment to carry out trade union duties and to take part in trade union training. This is set out in the 1992 Trade Union and Labour Relations (Consolidation) Act. The Act also gives them the right to unpaid time off to take part in trade union activities.

Confused already? Generally, *paid* time off is granted for industrial relations tasks that you undertake with your employer, eg negotiating on a workplace issue or representing an individual member, whereas *unpaid* time off

covers internal union activities such as organising and running branch meetings.

Note that the rights to reasonable paid and unpaid time off are legal minima. In many areas Prospect has negotiated agreements that improve on these rights, usually extending the right to paid time off to union activities.

These matters are explained more fully in the *ACAS Code of Practice on Time Off for Trade Union Duties and Activities*. See also our *Representative's Guide to Time Off and Facilities for Union Reps*.

For you to be recognised as a trade union representative your branch simply needs to notify your employer that you are a rep. It is not for the employer to pick and choose who the representatives are (though some try). You should have been elected or appointed at a membership meeting as determined within your branch rules.

Ask to see a copy of the recognition and procedure agreement your branch has with your employer (in the civil service this may be called a Whitley agreement). It may include what is known as a facilities agreement, which should detail your entitlements to time off and other support. Basically, the ACAS code says this should be 'reasonable' and should take account of issues such as the size of the organisation, working patterns of employees and their geographical dispersal. Your facilities agreement will probably interpret this in terms of days, hours etc.

In larger workplaces, where the relationship between the union and the employer is well-established and constructive, there will be quite substantial allowances of paid time off for one or more leading Prospect reps. Indeed, some reps are released full-time to undertake work on behalf of the union.

In addition to the general rights of reps, two specialist representative roles have additional rights under the law:

union learning representatives (ULRs)
safety representatives.

These roles are described in a little more detail in Chapter 3. Prospect produces specialist guides for them, which they receive when they are registered with the union as a holder of one of these posts.

Paid time off is allowed for industrial relations training relevant to a representative's duties. Prospect considers that all its training and education programme falls within this definition. If you experience any obstacles to release you should notify your Prospect full-time officer (FTO) or the education unit.

The education unit can offer you guidance about the best sequence of courses to follow on our training programme.

We run a one-day course called 'Getting Started' which we recommend as the starting point for all new or potential representatives. It is held four or five times a year at various locations, but if there are enough new reps in your branch we can arrange a course specially for you.

Once you've done the basic 'Getting Started' course we offer training on skills such as negotiating, representing individuals, how to make presentations etc. Beyond that we offer training on a wide range of issues from health and safety to employment law, or equal opportunities to change management.

Full details are available on our website, in our annual education brochure or from the education unit (education@prospect.org.uk).

If you are interested the education unit can draw up a personal development plan to guide you through the training which is most appropriate for you.

2

Prospect is an independent trade union. It is not affiliated to any political party. Its objectives are set out in the union's rules. It exists to:

- protect and promote members' interests
- maintain and improve the conditions of their employment and relations between them and their employers
- provide and maintain services for the benefit of members.

The union also aims to:

- improve the efficiency and well-being of all employing bodies where there is membership
- promote policies on science, technology and professional knowledge
- recruit all eligible staff to ensure that the union is strong and representative.

Prospect promotes equal opportunities for all members within the union itself and within their employment, irrespective of race, ethnic origin, sex, disability, sexual orientation, gender identity, age or religion.

Prospect also aims to co-operate, support (financially or otherwise), or participate in the work of other bodies whose objects or activities seem to the union likely to advance, directly or indirectly, the interests of members of the union.

Prospect's structure is set out in the chart on page 8. It is based on three principles:

- control of the union resides in the members with the shortest possible route between members and decision-making bodies
- union organisation should match that of the employer to facilitate effective

representation and recognition
members' industrial, professional and specialist interests should be catered for.

In pursuit of these principles:

- a national conference is held every two years to formulate policy
- where possible, the union structure is based on employer units through branches
- different groups cover specialist or industrial interests on union-wide matters that are of concern only to those groups.

The constitutional arrangements for running the union are in the Prospect rules, which are available from headquarters or can be downloaded from the Prospect website.

Members are the most important part of the union! There are two types, with different degrees of participation in the union's structures:

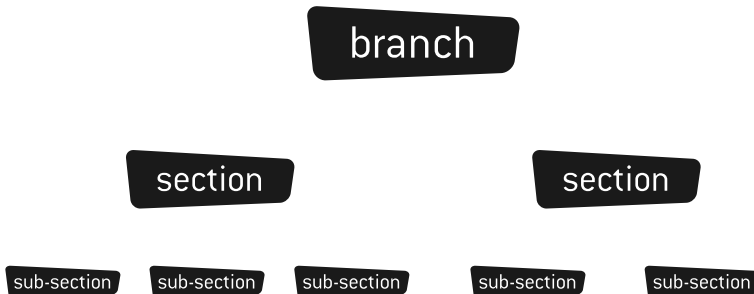
- working members – full members of the union, with full voting rights
- associate/retired members.

The key unit of organisation is the branch, which forms the basis of representation to other advisory or policy-making bodies in the union structure. There are about 250 branches in Prospect. They are generally employer-based and should match the employer's organisational structure as far as possible.

There are also a number of regional branches. These contain small groups of members from various employers which are too small to form their own branches, or individual members who work for employers where Prospect is not recognised.

Branches are very different in their occupational, functional and geographical spread. In some cases all the members are located in a single building; in others their members are scattered throughout the UK and even around the world.

Branches that cover a number of different occupations and/or locations usually have sections and sub-sections based on employer sub-units, establishments, geographical locations or occupation.



The day-to-day work of the branch is overseen by a branch committee (variously called branch council, branch executive council, branch executive committee, etc). The committee will be established in accordance with the branch's own rules (model rules for branches are available from the ROMS department and the *reps' resources* area of our website). Its members will be reps drawn from sections or directly elected by the membership at large.

As well as deciding the union's position on issues that are subject to consultation or negotiation with the employer, the branch committee has to ensure that its routine business is conducted efficiently.

An effective branch committee should base its work on an annual calendar and:

- issue an annual report
- issue an audited statement of annual accounts
- elect representatives to relevant bodies
- hold an annual delegate conference (ADC) or annual general meeting (AGM)

- elect officers (if not done by the ADC or AGM)
- issue a report on action taken after the ADC or AGM
- inform and consult members
- ensure branch officers and other reps are trained
- oversee section and sub-section accounts.

The National Executive Committee (NEC) conducts the business of the union in accordance with the policy laid down by national conference. It manages the union's affairs between conferences and normally meets eight times a year. The powers of the NEC are laid out in the Prospect rules.

The NEC consists of 23 working members, including three office-holders – the president, vice-president and deputy vice-president (the 'presidential team'), plus the general secretary. The general secretary has no voting rights. Senior Prospect staff may attend NEC meetings in an advisory capacity, but they have no voting rights.

The NEC is elected by working members every two years. It serves from the conclusion of one national conference until the conclusion of the next.

NEC members do not represent particular branches nor their particular professions. They are elected to look after the interests of the whole membership. It is, of course, important that the experience and knowledge available on the NEC should be wide and varied, and branches should consider the whole field of union membership rather than solely their own branch membership in nominating eligible candidates.

The president is elected annually from among the voting members of the NEC by a ballot of the whole membership. The other members of the presidential team are elected by national

conference or by ballot of branches in non-conference years.

The NEC establishes such sub-committees as necessary for the despatch of its business. Each of them may set up panels or working parties reporting to them on particular aspects of their work. Some of these committees invite direct participation by reps from branches.

Branches in a particular industry or industries may also be allocated to a sector. Each sector has an executive committee which is elected every two years at their sector conference from among the members of the sector. Sectors have delegated authority in respect of matters affecting them, but cannot implement any policy that would be in conflict with any Prospect national policy.

There are currently two sectors, the EMA sector (consisting of members in the areas formerly comprising EMA) and the civil service sector (members in the civil service and related bodies).

Where a number of branches have members working in the same profession, the NEC may create a professional or industry advisory group whose duties are to discuss and advise the NEC on matters affecting the professional interests, structure, salaries and conditions of its members. For example, the Heritage Group covers curators, conservators and archaeologists across a range of employers. The Science, Engineering and Technology (SET) Group is the largest of these groups.

Such groups may, with the approval of the NEC, have executive powers exercised through an annual delegate conference which can determine policy on matters solely affecting members of the group.

Where members in a single employing organisation do not all belong to the same branch, the relevant branches may come together as a departmental or employer-based group. The group will manage business relating to the interests of members with that employing organisation, including safeguarding and improving the pay and conditions of those members. The largest of these groups is the Ministry of Defence Group.

Another, less formal, set of official machinery is the range of Prospect networks that have been established to bring together reps and members with particular interests for the purposes of campaigning and sharing information. Current networks include homeworking and young members, and also cover a range of diversity issues.

The AMG is a large national group, with a number of active, geographically organised area committees (currently 20). It covers all associate members and sends two observers to the NEC. (This may be renamed the Retired Members' Group group at the 2004 national conference.)

The purpose of Prospect's biennial national conference is to formulate policy, approve the annual report and statement of accounts, consider rule changes, and elect the vice-president, deputy vice-president, the standing orders committee (SOC) and delegates to the Trades Union Congress (TUC) and other conferences for the coming year. It is usually held in May and lasts for two-and-a-half days. Sector conferences are held on the day before the main conference.

All branches with over 20 members are entitled to submit motions to conference, send delegates, and make nominations for the presidential team, SOC and TUC delegates. The basis of conference representation is laid down in the Prospect rules. In January of a

conference year Prospect headquarters issues a statement setting out the total paid-up membership as at 31 December the previous year, broken down into branches, with the number of delegates allocated to each branch.

Conference broadly follows familiar rules of debate. An SOC of three members, none of whom may be members of the NEC, is elected to prepare the agenda and to advise on procedure. Each SOC member holds office for three conferences, one vacancy being filled by election at each conference.

It is conference's responsibility to lay down general union policy for the next two years. It is the NEC's duty to implement that policy. So motions for conference should be those on which a policy decision is desirable from the membership as a whole.

There is no limit on the number of motions that can be submitted by any one branch, but to ensure they can be discussed adequately, branches should table only those motions that can be discussed in the time available.

Branch resolutions which do not raise important policy issues should be submitted directly to the NEC for consideration at any time, as should motions which are limited to a local issue but on which the branch requires help, thus saving time at conference. For example, a motion dealing with a government decision to reorganise a department or one dealing with problems created by a large redundancy programme in a company should not be forwarded to national conference.

Motions dealing with particular sector interests should be submitted to the appropriate sector conference or executive committee for consideration.

Conference motions should be in the form of an instruction to the NEC and most motions

include the words 'This conference instructs the National Executive Committee...'. The motion should give a clear statement of the action proposed.

It is best that a motion does not include arguments in support of the proposed line of action, though the policy proposed should be sufficiently explicit to be understood by other branches, who will be considering their attitude to motions before the conference meets.

The motions submitted by branches and by the NEC are listed in the conference agenda. Copies of the agenda are sent out to branches well before conference so that branch committees have a chance to discuss the various issues and guide their delegates on the views which they should take on the motions.

The Prospect rules specify that the national conference is held on a date between 1 April and 15 June every other year as the NEC decides. The date must be published at least 14 months before the start of the conference. A conference timetable is published towards the end of the year preceding conference.

Each branch should prepare its own calendar to ensure that members have adequate opportunity to participate fully in the formulation of policy.

Ideally, the branch timetable should be arranged to enable members to discuss policy motions intended for submission to their subsection, section or branch meeting, and for these meetings in their turn to be able to debate fully the motions on topics appropriate for the national conference.

In a conference year this means holding your branch conference *before* the closing date for motions and nominations.

3

Not all reps will have a recognised job description as such, but can simply be described as local representatives: the face of the union in a particular workplace or location. Some reps – notably branch and section officers – have very specific responsibilities, usually defined in the branch's rules. In the list that follows, for 'branch' you can read 'section', as appropriate.

At the time of writing, a series of guides to some of these specific roles was planned. Look out for these if you need further detail about what is involved in these jobs.

The president (or chair, or convenor in some Scottish branches) presides at all branch conferences or committee meetings and is responsible for:

- the proper conduct of the meeting
- ensuring that business is kept moving
- clarifying the issue under discussion
- ensuring that clear decisions are reached.

In the absence of the president, the vice-president will take the chair and, in the absence of both, the person in the chair will normally be elected from the members present at the meeting. Whoever is in the chair will normally have a casting vote in the event of a tied vote at branch meetings.

In most branches, the president will be an experienced rep who will usually have a wider representational role in negotiations or consultation.

The vice-president acts as chair in the absence of the president. Smaller branches may choose not to have a vice-president.

This is the key role in most branches. The duties of the secretary include:

- calling branch conferences or AGMs and meetings of the branch committee
- preparing and circulating minutes of these meetings
- maintaining branch records
- submitting to the committee matters referred to him/her by Prospect headquarters or by any member or body with which the branch is associated.

In most branches the secretary will be an experienced rep who will usually have a wider representational role in negotiations or consultation.

The secretary, in consultation with the president/chair, is responsible for preparing and circulating agendas for meetings, arranging dates and venues, dealing with correspondence, liaising with Prospect headquarters and, during meetings, assisting the president/chair by presenting information and introducing items for which s/he is responsible.

Some branches have an assistant secretary or minutes secretary to help with administration.

The duties of a membership and recruitment secretary include:

- maintaining local membership records as necessary
- liaising with Prospect headquarters on the recruitment of eligible people into membership
- organising membership recruitment within the branch and reporting regularly to the branch committee on the recruitment of non-members where relevant, keeping in close touch with sections about their membership position and helping them to organise their recruitment effort.

Prospect encourages branches and sections to develop the membership secretary role into that of an organiser, placing more emphasis on membership growth and the health of the union's organisation in the workplace. Some branches have split the role and have both types of post.

Branch organiser

The additional duties of the branch organiser include:

- mapping the workplace: establishing how many non-members there are and where
- organising and co-ordinating recruitment campaigns
- overseeing the network of local reps and identifying gaps and training needs
- developing and maintaining a branch development plan (BDP) – summarising the objectives and actions envisaged to strengthen organisation and increase membership.

The treasurer's duties include:

- the proper use, custody and accounting of the funds allocated to the branch by the NEC, including paying branch expenses
- preparing an annual income and expenditure account, making up a balance sheet to 31 December of each year and submitting it for audit in time for the annual conference or meeting
- supplying any additional information on finance needed by Prospect headquarters where relevant, transmitting to section treasurers the money allocated by the branch committee.

Where a branch is broken down into sections and sub-sections some or all of these officerships will also exist at section and sub-section level .

There are two types of representative which exist on a statutory basis, ie they have specific rights under the law.

Branches may seek to appoint union learning representatives (ULRs), as appropriate, whose duties are:

- promoting training and development in the workplace by providing advice and information on learning initiatives
- supporting members who want to review and broaden their portfolio of skills
- helping to identify sources of training or learning provision
- acting as a confidential sounding board for individuals on development issues, referring them to local branch representatives for advice as needed
- working in partnership with the employer to meet the skills and learning needs of individuals and the organisation
- giving feedback on members' views and experience of learning at work to the branch and the employer
- raising the profile of training and development on the bargaining agenda
- participating in Prospect's ULR network.

ULRs have specific legal rights and powers (see the Prospect *Union Learning Reps factcard and Negotiator's Guide to Training and Development*).

Branches appoint health and safety representatives, as appropriate, whose duties are:

- inspecting the workplace periodically
- representing members' health, safety and welfare interests
- investigating potential hazards, accidents, dangerous occurrences and health and safety complaints raised by members
- being consulted and making representations to the employer over health and safety
- receiving information and being kept up-to-date with health and safety developments
- attending appropriate safety committee meetings.

Safety reps have specific legal rights and powers (see the Prospect *Negotiator's Guide to Health and Safety*).

Branches often appoint reps whose remit is to deal with specific issues such as equal opportunities and superannuation.

Well organised branches usually develop a network of local representatives to undertake a range of tasks, depending on the type of branch or workplace. These include:

- acting as a focal point for Prospect in their area

eliciting and conveying the views of members to the branch or section
maintaining the local notice board
distributing Prospect newsletters
ensuring non-members are approached to join and keeping a record of approaches made and, if unsuccessful, the reason
ensuring changes in members' details and location are passed to the branch or section.

Local reps may be known by various titles – site secretary, correspondence rep, or just 'Prospect rep'. In the EMA sector many are known as technical reps, or TRs.

4

As well as over 4,000 reps, Prospect has around 150 staff who are there to help you deliver our services to members.

Prospect has a London headquarters and offices in Scotland, Wales and the English regions.

The headquarters building accommodates the general secretary, deputy general secretaries and a number of specialist support departments:

- Administration/Central Services and Human Resources
- Communications
- Finance
- Recruitment, Organisation and Members' Services (ROMS)
- Research and Specialist Services (RSS), which covers areas such as education, equal opportunities, health and safety, legal, pay and pensions.

There are also a number of negotiating teams working at headquarters, serving branches based in and around London or where bargaining activity is mainly in London.

Each regional office has one or more teams of negotiating and support staff with responsibility for specific branches and groups of members.

The general secretary is the head of the full-time staff. The GS is the principal negotiator and has overall responsibility for all negotiations undertaken on the union's behalf and for all the services provided for members. The GS is elected by a ballot of all members every five years, as required by law.

The membership department is based at our Chertsey office. It is responsible for maintaining accurate records of current and past members. A variety of functions, including the issue of Prospect membership cards and the distribution of *Profile*, the members' journal, are based on these records.

All changes of members' details should be notified to the membership department as soon as possible. In most branches this will be the responsibility of the membership and recruitment secretary/branch organiser.

It is also important to notify the membership department of all changes of branch reps and officers. This will ensure that communications are sent to the appropriate people, and that they have the correct level of access to the Prospect website.

Prospect provides many sources of advice and support for members and reps. A lot of the advice you might need will be available in our range of members', representative's and negotiator's guides, our reps' journal *Report* and on the website (see Resources, page 18, for further information). But there will be times when you need to turn to someone else with special knowledge or experience for help.

If you are confronted with a question, issue or problem that is either outside your experience or of a particularly complex nature, in the first instance you should try speaking to another rep in your branch or section. It is highly likely that the answer will be available from someone like your branch secretary, or another rep on your branch committee. There

are significant advantages in keeping it local: the issue may have arisen before and a useful precedent may have been set the answer may require detailed knowledge about that employer's terms and conditions and procedures you are more likely to sort out the member's problem quickly.

Some problems will either be so serious or so unusual or complex that the advice of your full-time officer (FTO) or an HQ department is required.

For issues concerning representation, including legal advice, in all but the most urgent cases it is best if you deal with HQ through your branch secretary or another leading branch representative. In some branches, the FTO may be your branch secretary anyway. If the FTO feels that further specialist advice is required (be it legal or pensions or similar), he or she will seek this from the relevant HQ department.

The Research and Specialist Services department (RSS) can provide assistance on a range of matters, including employment law and pensions, but representatives should generally liaise with their FTO in the first instance.

If you want to attend a Prospect education course you can make direct contact with the education unit, which is part of the RSS department. You do not need to apply via your FTO, although the education unit will notify them of any courses you attend.

You can contact other relevant HQ departments directly if the advice or support you require does not concern a representational or bargaining matter. Whether you want help with your branch communications or with recruitment and organisation, there is no need to go through your FTO. However, it always makes sense to keep relevant reps on the branch committee and your branch secretary informed of any requests for help you have sent directly to HQ.

5

Meetings are a medium for debate, decision-making and distributing information.

Effective meetings are an essential way of progressing the union's work: issues are raised, options considered and actions agreed.

There are, of course, many other types of meeting that you may be involved in, from one-to-one meetings with a member seeking your help, to large set-piece negotiations with management.

This section outlines the main factors in running effective union meetings.

Attendance should normally be limited to members, but they can sometimes be an opportunity to recruit non-members. For example, if the meeting is about a controversial management proposal you might want to invite non-members along, so they can see what action Prospect is taking. Make sure you've got a supply of application forms on hand, and try to sign people up there and then.

The secretary should draw up an annual programme of branch or section committee meetings so that committee members are aware of their commitments for the year. Try to set the time of the meeting so that it is convenient for all committee members, and choose a meeting place and time which will minimise the costs, such as travelling expenses.

Arrangements for annual general meetings or annual delegate conferences should be made

well in advance of the date to allow time for preparation of accounts, reports, motions etc, and for members to take part in any postal ballots.

Checklist for organising a meeting:

- agree to hold meetings at a time and place which would best suit the members (remember that many people find it difficult to attend meetings outside working time, for example because of childcare commitments)
- book a room
- provide transport and passes for outside visitors where necessary
- publicise the date, time and venue of the meeting (posters on noticeboards, email notification to all members etc), with details of what is going to be discussed. Sometimes this will involve circulating a formal agenda, but if the meeting is to discuss a single workplace issue an agenda is not necessary. Meeting room facilities are available free of charge to branches at Prospect headquarters, Harpenden and a number of other regional offices.

It is the secretary's responsibility to prepare and circulate the agenda. The secretary should consult the president and other officers on the items to be included, and also add any items requested by individual members of the committee.

If possible distribute the agenda and relevant papers so that members of the committee receive them at least seven days before the date of the meeting. Committee members should read all relevant papers before the meeting.

Every agenda for a branch committee should include the items shown on the model agenda (see below). However, all important subjects, whether they arise from the minutes or not, should be given their own place on the agenda.

It is important to ensure that there is enough time available for a proper discussion of the items on the agenda so that decisions are not reached on the basis of incomplete consideration.

Writing the minutes of a meeting is an important job. As a permanent record of the business transacted, the minutes will be referred to whenever a query arises in connection with a decision (eg over policy). So it is essential that the minutes are:

- complete but concise; not a record of members' speeches
- balanced and unbiased
- a correct summary of the business transacted and a careful statement of all the decisions taken, with details of voting where appropriate
- prepared and circulated promptly while the matters are fresh in members' minds

numbered and cross-referenced intelligently.

They should also indicate specific responsibilities for follow-up action. The minutes of any meeting should include a list of those present and apologies for absence. Their accuracy should always be confirmed at the next meeting.

If your branch or section has its own newsletter, website or intranet site, copies of minutes should be sent to the rep responsible for these media, drawing attention to any newsworthy items.

If your branch or section has organised the meeting it will pay any expenses you have incurred in attending. Your branch or section treasurer will have the necessary forms and will reimburse you by cheque. Receipts are generally required where available.

If the meeting was organised by Prospect headquarters, your expenses will be paid by the union nationally. The appropriate claim form should be provided at the meeting.

Note that Prospect reimburses 'out of pocket' expenses. We do not pay daily allowances.

Model agenda

The next meeting of the [title] committee will be held at [time] on [date] at [venue]. The agenda is set out below.

Agenda

1. Minutes of the meeting held on [date]
2. Matters arising not otherwise on the agenda
3. Secretary's report including correspondence
4. Treasurer's report
5. Branch organiser's report and review of branch development plan
6. Reports from representatives (eg health and safety rep, equal opportunities rep)
7. Other items (eg issues which the secretary has been asked to include on the agenda)
8. Any other business
9. Date of next meeting

6

Why do people join unions? Recent surveys reveal ten main reasons:

- advice and representation if something goes wrong in the workplace
- to improve pay and conditions for a healthier and safer workplace
- fear of redundancy or major change
- to be better informed about what is happening at work
- to have a say in what is happening at work
- because all their workplace colleagues are in the union
- because they believe in trade unions
- for the range of members' services provided
- to use the union's educational services.

The first two are those most commonly quoted.

When asked how a union can best deliver these benefits, most people said by working effectively with their employer rather than in confrontation.

Recruitment is vital. If Prospect doesn't continually recruit new members it will not survive. Subscription income is vital if we are to maintain and improve the level of service we provide. Natural wastage, for example through retirement, means that we have to recruit over 500 new members a month just to stand still.

But we don't just want to maintain our existing membership figure - we want to grow. The more members we have, the stronger we are. A workplace with 100% membership is in much better position to resist an unwelcome

management proposal than one with only 60% membership.

The branches that are most effective at recruiting have two obvious characteristics: they see recruitment as a task for everybody – not just certain reps, or even all reps, but all members they have a high profile in the workplace: their activities, local communications and the respect in which they are held by management as well as staff mean they are central to working life in that area.

If you ask someone why they are not in a trade union, the most common answer is that they have never been asked. Another frequent response is that the union in their workplace isn't effective. As a Prospect rep you can help overcome both these concerns.

You can help by:

- always having a supply of membership application forms – they're available in printed format, or in PDF format on the national Prospect website, on branch websites and intranets
- knowing the current subscription rates
- having supplies of key documents such as recruitment leaflets, our 'benefits and services' booklet and members' guides
- being aware of what Prospect is doing in your workplace
- knowing who is and is not a member in your area.

A guide to recruitment and organisation is planned for summer 2004 and will include detailed information and advice on planning and running local recruitment campaigns.



Prospect provides a range of resources to keep reps informed and help them do their job as effectively as possible.

Profile is our members' magazine. It is delivered direct to every member. If a member is not receiving *Profile*, the most common reason is that we don't have an up-to-date address on their membership record.

Report is our regular magazine for reps. It covers a range of issues, from pay bargaining data to updates on our education programme, and it is the key resource for our active reps. All reps should automatically receive a copy – if not, this is a sign that our membership department isn't aware of their status.

We produce a number of other regular newsletters. These currently include:

Safety Notes – for health and safety reps

Equal Opportunities Update – for equal opps reps

Green Matters – on environmental issues.

This is a new series of short, pocket-sized guides on specific subjects, to help reps deal with key issues such as handling personal cases.

These are more lengthy A4 guides containing detailed information and guidance about issues such as workplace training and development, equal pay and health and safety.

Although principally aimed at members, these short booklets summarise the best advice on

a range of issues. Topics include maternity rights, health and safety, and work-related stress. You should keep a stock of these to help you when advising members.

These are brief guides of 'bite-sized' information. Topics include safer driving, legal rights and safe use of VDUs. Some larger employing areas have factcards detailing their main terms and conditions of employment.

All these documents are available from the central services department at Prospect House or from your regional office. They are available electronically, and can be downloaded in PDF format from the *documents* area of the Prospect website.

This contains a selection of resources, including this handbook, to help reps understand their role and ensure they have the tools they need in their workplace. Its contents will evolve over time and can be adapted for different roles. It includes reps' guides, banners, blank posters, reps' cards for noticeboards; a desk calendar; A4 recruitment/ULR posters; and A4 blank 'Prospect news' paper.

Prospect produces a number of publications that are either required by law, such as our annual report and accounts, or that are essential for the conduct of conference business, such as the agenda, and *Action Taken* which explains what progress has been made on resolutions carried at the national conference. These are generally distributed to branch secretaries, but can also be downloaded in PDF format from our website.

The Prospect website has three main levels of content: public, members-only and reps-only. Members have to register before they can log into the restricted levels of the site for the first time. During the registration process they create their own personal password, and on subsequent visits to the site they can log in using their membership number or their email address, plus their personal password.

The website should automatically recognise if you are a rep: when you log in you should see the word 'representative' after your name. If not, your branch or section secretary should contact the membership department to confirm your status as a rep and make sure it is registered on your membership record.

Once you've logged in you won't see an area of the site that is branded 'reps only', but will automatically get access to additional content that a member of the public or an ordinary member will not see. You will also be able to download the full range of publications and circulars from the 'documents' area of the site. This includes PDF versions of *Profile*, *Report* and all our guides.

We offer branches, sections and groups the facility to set up and manage their own quick and easy websites, without the need for special software or programming skills. A list of existing sites is available on the national website and appears regularly in *Profile*. Contact the communications department for further information.

For branches that don't have internet access at work we can provide a package of basic

intranet content. So if your employer is willing to give your branch, section or group a presence on their intranet we can help you set something up.

If you want to set up your own local newsletter we can provide software, train you in layout and writing skills, and help you with the design, printing and distribution.

The Recruitment, Organisation and Members' Services department (ROMS) can assist you in planning and running local recruitment campaigns. Ideally, recruitment activity should take place as an integral part of the work of your branch or section. But it is essential that you have access to the materials you need to attract new members.

ROMS has a range of national recruitment leaflets and can help you write, design and print leaflets for your branch or even a specific workplace. ROMS also has a range of display stands and promotional items that you can use for special events.

Where possible the Research and Specialist Services department (RSS) provides information, advice and support on a range of issues including pay, health and safety, equal opportunities, pensions and employment law. But if you need advice on any of these issues you should speak to your full-time officer (FTO) in the first instance. RSS also manages the union's training programme through its education unit (see chapter 1, page 3).

See annex, page 23.

8

1. Do I need any qualifications to become a rep?

There are no qualifications or accreditation required (although see below for ULRs). However, we recommend that all reps undertake Prospect training to develop skills and confidence. Courses include 'Getting Started', 'Negotiation Skills', 'Employment Law' and 'Handling Personal Cases'. Further details are available in Prospect's education brochure, produced each year.

Many reps find they develop greater confidence and expertise if they undertake specialist training on areas where they are required to be active (eg pay, pensions, personal cases).

ULRs are required to undertake approved training, as set out in the ACAS Code of Practice (see the Prospect *Union Learning Reps Factcard* and *Negotiator's Guide to Training and Development*). Prospect ULR training is accredited by the Open College Network, as also recommended by ACAS.

2. Do I need permission from my employer to be a rep?

No. Reps are usually elected or appointed to represent colleagues in an organisation where Prospect is recognised for collective bargaining. The collective bargaining agreement describes the arrangements for workplace reps, including the constituencies they represent and whether time off for performing trade union duties is permitted.

3. How much time a week do I need to commit to being a rep?

There is no set amount of time – it will depend on whether you have an entitlement to attend to union duties during work time (often called facility time), and how much of

your free time you are prepared to commit. It will also be influenced by your level of involvement in trade union activities.

4. How should I communicate with members I represent – is it ok to use my employer's email system and internal mail?

Your branch secretary can give you guidance, but your employer will usually authorise representatives to use certain facilities, which may include email and internal mail. Membership meetings are a common form of communication; they may be centred around particular issues or be held on a regular basis.

5. What support is available if I am asked to deal with a matter that is complex or potentially involves legal issues?

If the matter is a personal case consult our *Representative's Guide to Handling Personal Cases*. Support is available by consulting with other reps in your branch and your branch committee.

For complex matters, Prospect's Research and Specialist Services department and the full-time officer for your branch can provide advice via your branch secretary.

6. What kind of material does Prospect suggest I hold as a rep?

Prospect suggests that you retain copies of your staff terms and conditions (eg staff handbook, policies and/or standard personal contracts) including copies of your employer's grievance and disciplinary procedures and any relevant collective agreements for reference.

Prospect has published a range of guidance booklets which provide advice on a range of subjects – see the Resources chapter (page 23).

7. What if I am asked to represent a member in a dispute with another member?

Should this occur, Prospect has a 'conflict of interest' policy that allows both members to be represented separately. Speak to your branch secretary in the first instance.

8. Can I be disciplined or otherwise disadvantaged by being a rep?

Provided you act professionally and are not in breach of the relevant disciplinary code/employee rules, you cannot be disciplined merely for trade union activity.

Legislation is in place to protect trade union representatives from victimisation (see our *Representative's Guide to Time Off and Facilities for Union Reps*).

Many reps find that the experience they develop as a rep enhances their negotiation skills and this in turn has a positive impact on their own professional/personal development.

9. As a rep, am I expected to recruit new members?

To improve Prospect's strength and influence within your organisation it is vital that all members – not just reps – promote the benefits of membership to non-members. Reps take an active role in identifying potential membership targets and are often the first point of contact for non-members making enquiries about Prospect.

10. How do I know which of my colleagues are members and which are non-members?

Information about trade union membership is covered by the Data Protection Act. But as long as you use the information for a legitimate union purpose and do not disclose the information to a third party (including the employer) there should be no difficulty in you cross-checking Prospect membership lists with locally-held staffing information. Prospect lists are available from our membership department, and online access to our database will be available from the end of 2004.

9

As a Prospect rep, you are a key participant in a wider community of trade unionists. Here, we provide some background to UK trade unionism in the 21st century and Prospect's position within the movement.

The face of trade unionism has gone through many changes in the last 25 years. It is still changing.

We went through a substantial decline in the 1980s and '90s. But in the last few years things have stabilised and started to improve.

In terms of numbers, trade unionism reached its height in 1979 with 13 million members. Today that number stands at 7.25m, which equates to 29% of all employees. Men make up 53% of trade union members, women 47%.

Contrary to most assumptions, the highest recorded union density is among professional employees at 48%. Employees with supervisory responsibility have a higher than average density at 37%.

Trade union membership increases with age, with 38% of employees in their 40s being in trade unions compared to only 19% of those under 30.

Around 26% of black and Asian employees are in unions.

Trade union membership also varies around the country with 40% of employees in Northern Ireland being members – in the north-east and Wales the figure is 39% but in the south-east it falls to 22%.

Finally you are much more likely to be a trade union member if you work in the public sector (59%) than if you work in the private sector (19%).

Despite the fall in numbers, the case for trade union membership remains strong:

All but three of the top 45 private sector employers in the UK have collective bargaining agreements with trade unions. A recent report by the Joseph Rowntree Foundation showed that "unions continue to raise pay in the private sector, keeping it above levels in comparable non-union workplaces". It is estimated that the trade union pay premium is around 10%.

Gender equality on pay is much greater where trade unions are recognised.

Provision of an occupational pension is six times more likely to occur in a unionised workplace.

Enhanced sick pay is three times more likely in a unionised workplace.

Having a recognised union in the workplace is more likely to lead to an equal opportunities policy and a wide range of family-friendly policies.

The likelihood of someone having a serious accident at work is around 50% greater in a non-unionised workplace.

And if the employer asks what's in it for them, it is estimated that the average financial performance of companies with unionised workplaces is 7% better than those without.

Prospect was formed on 1 November 2001 with the merger of two existing unions, the Institution of Professionals, Managers and Specialists (IPMS) and the Engineers' and Managers' Association (EMA). Prospect has around 105,000 members in the public and private sectors – engineers, scientists, managers and specialists – and is the largest union in the UK representing professional engineers. Our members work in areas as diverse as agriculture, defence, energy, environment, heritage, law and order, shipbuilding and transport.

Both unions had their roots in the public sector, with IPMS (formerly IPCS) representing professionals in the civil service and EMA (formerly EPEA) representing specialists in the utilities, in particular power generation, distribution and transmission.

During the 1970s and 1980s IPMS found itself with members in fringe bodies which were partly or wholly financed by government and in private companies whose origins lay in the civil service. Increasingly, in some of the smaller organisations where it represented staff, IPMS came to represent all non-industrial staff, with the consent of other relevant unions.

In the late 1980s and early 1990s, IPMS membership began to shrink as a result of privatisation and cutbacks in the public sector. IPMS decided to focus more on organisation and recruitment and took on staff to assist branches in this area.

Also, given that it was no longer purely a union for professional civil servants, IPMS started to look for other areas in which to organise, and sought and gained recognition with a number of new employers. These initiatives resulted first in membership levels stabilising and then a small increase, meaning that at the time of the merger IPMS had a membership of over 75,500.

EMA faced similar problems with the privatisation of the major utilities in the

1980s. EMA also took the opportunity to branch out into new areas and, at the time of the merger, had over 28,500 members.

Recognising such strong similarities in their backgrounds, IPMS and EMA started talks about a possible merger and came together in November 2001 with just over 104,000 members.

Since then, Prospect has continued to expand to cover new groups of members and has seen an increase of over 1% in working members.

At the start of 2004, Prospect was the 14th largest of the 71 unions in the TUC.

Prospect's vision is to create a better life at work for members. We want to prove our relevance to the employment needs of professionals and specialists in the public and private sectors.

Each and every one of our reps plays a part in working towards that goal. Your input is vital.

So whether you help an individual member by providing them with a relevant Prospect guide or by personally handling a disciplinary case, whether you consult your members for their views on a pay deal or negotiate that pay deal yourself, you will help us achieve our vision.



Acas aims to improve organisations and working life through better employment relations. It provides up-to-date information, independent advice, high quality training and works with employers and employees to solve problems and improve performance.

www.acas.org.uk

The TUC has 71 affiliated unions representing nearly seven million working people from all walks of life. It brings Britain's unions together to draw up common policies, and its *unionreps* website enables reps to share experience and discuss tips, techniques or problems with reps from other unions.

www.tuc.org.uk

www.unionreps.org.uk

LRD is an independent research organisation publishing news and information for trade unionists.

www.lrd.org.uk

Employment tribunals resolve disputes between employers and employees over employment rights.

www.employmenttribunals.gov.uk

Don't forget, in most instances reps should seek the advice and assistance of other reps in their branch – possibly their branch secretary – before contacting a Prospect full-time officer.

www.prospect.org.uk

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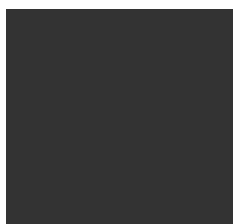
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ACAS code of practice	, 19	Profile magazine	12, , 18
Action Taken	17	Recruitment/	
Agendas	, 15	organisation	9, 10, 13, , 18, 23
Annual report	17	Regional branch	4
Associate/retired members	4	Regional offices	, 14, 23
Associate members' group	6	Report magazine	12, , 18
Branch	4	Representative roles (see also separate list)	
Branch committee	5	Representative's guides	3, , 18
Branch council	5	Rep's toolkit	1,
Branch development plan (BDP)	10	Resources	1, 5, 12,
Branch executive	5	Retired members	4
Civil service sector	6	Rules – national	4, 7
Communication	13, 23	Rules – branch	3, 5, 9
Data protection act	20	Section	5, 9, 10
Deputy vice-president	5, 6	Sectors	6, 7
Education (Prospect)	, 13, 18, 19, 23	SET group	6
EMA sector	6	Standing orders committee (SOC)	6,
Employer-based groups	6	Structure of Prospect	, 8
Equal opportunities	4, 11, 12, 17, 18, 21	Sub-section	5, 10
Expenses	15	Technical rep (TR)	11
Facility time	3, 19	Time off for union activities	, 3, 19
Factcards	17	Trades Union Congress (TUC)	6, 22,
Full-time officer (FTO)	3, 13, 18	Training for reps	, 13, 18, 19, 23
General secretary	5, 12	Vice-president	5, 6
Headquarters	12	Website	5, 12,
Heritage group	6	Websites, local	18
Intranets, local	18	Working members	, 5
Meetings			
Members' guides	17	Branch organiser	10
Membership department	, 18, 20, 23	Chair	9
Membership records	9, , 16	Convenor	9
Minutes	9,	Correspondence rep	11
Motions	7	Health and safety rep	10
MOD group	6	Membership and recruitment secretary	9
National conference	4, 5,	President	9
National Executive Committee (NEC)	, 7	Secretary	9
NEC sub-committees	6	Site secretary	11
Negotiator's guides	10, 11, , 19	Technical rep (TR)	11
Networks	6	Treasurer	10
Newsletters	16	Union learning rep (ULR)	10
Objectives of the union	4	Vice-chair	9
Personal cases	19	Vice-president	9
President	5		
Presidential team	5		
Professional groups	6		



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