

## **POLICY ON PROVISION OF FACILITIES FOR RECOGNISED TRADE UNIONS**

### **Our Aims**

Both BT and the BT Unions are committed to promoting excellent industrial relations within the company. BT acknowledges the key role played by the recognised BT Unions in representing the views and interests of our employees both on a collective and on an individual basis, and is committed to :

- Full and timely consultation and negotiation where appropriate on all matters affecting the terms and conditions and working environment of the company's employees
- The resolution of any issues or disagreements through constructive dialogue wherever possible

### **Our Guiding Principles**

Both BT and the BT Unions recognise the need to :

- Maintain a consultative machinery which ensures effective representation whilst minimising costs
- Enable co-operation in change in a timely manner whilst ensuring appropriate consultation and agreement where necessary
- Respect the commercial confidentiality of any information provided, and comply fully with BT policy in this area

BT will provide the elected Officials of the recognised Trade Unions with an agreed amount of facilities necessary for them to carry out their responsibilities. These will include :

- Timely provision of appropriate information
- Access to the appropriate policy documents whether in paper or electronic format
- Accommodation, office and communications equipment (subject to Office Facilities paragraph under 'Facilities other than Paid Time Off' below)
- Sufficient paid time-off to enable them to :
  - a) Study and evaluate any company proposals and associated information
  - b) Consult with colleagues and members
  - c) Meet with BT management
  - d) Communicate with colleagues and members on the outcome of consultation/negotiations
  - e) Prepare cases and raise issues and concerns, relevant to the company, with BT management
  - f) Represent members on an individual basis where necessary including preparation of cases, representation at formal meetings eg. under the Discipline or Grievance procedures etc.
  - g) External affiliations where specifically authorised by BT Group ER

This list is not exhaustive and may include any activities aimed at promoting excellent industrial relations between BT and the BT Unions.

BT reserves the right to suspend or withdraw facilities at any time if in the company's opinion they are being inappropriately used.

***Facilities must not be used for the purpose of organising, participating in or inducing others to participate in industrial action . Any breach of this condition will result in the withdrawal of facilities from the individual and/or the branch concerned.***

BT Group ER will inform the appropriate Union HO whenever withdrawal of facilities is being considered.

Individuals should not be financially penalised or otherwise disadvantaged due to becoming elected trade union representatives. Line managers should consider any allowances the representative wishes to claim, based on what other members of the team are being paid, following advice from the line HR Manager. As far as eligibility for scheduled overtime and shift allowances are concerned the representative will need to demonstrate that they have regularly earned these payments in the past. The twelve month period prior to full-time release will provide an indication upon which an average payment may be based. These payments should be reviewed regularly to ensure that they continue to reflect the payments made to the other members of the representative's team.

## **PROVISION OF FACILITIES TO RECOGNISED TRADE UNIONS**

### **PROCEDURE AND GUIDELINES**

#### **Scope**

This policy and the associated procedure and guidelines apply to all UK based BT people.

This policy does not cover facilities for Union Safety Representatives, Health and Safety committees or Union Learning Representatives, for which separate arrangements apply.

#### **Roles and Responsibilities**

BT Group Employee Relations are responsible for :

- Ownership of the policy, procedure and guidelines
- Authorising all facilities granted under this agreement unless this is specifically devolved to Line of Business HR/ER Managers or individual line managers (see arrangements for Branch Officers below).

Line Managers are responsible for :

- Day to day management of elected union representatives eg. advice and support, 1:1 performance and development reviews, co-ordination of DPR's, sick absence reporting etc.
- Authorising/recommending time off for branch officers on part-time facilities
- Referring facility time requests to their ER manager for authorisation where the total facility time requested exceeds the agreed branch entitlement
- Providing copies of credential forms to ER managers to enable the central facilities database to be updated

The BT Unions are responsible for :

- Notifying the company of the election/appointment of Union representatives using the credential form at appendix 1.

#### ***Definitions***

Senior Representatives are :

- CWU- Members of a union National Executive Committee (NEC)
- Branch Secretary and Chair
- Connect – Members of BT Committee and Industrial Relations Committees (IRCs)
- Other representatives as agreed between the company and the union

Other representatives are :

- Branch committee members
- Workplace representatives

## Process

### i) CWU Arrangements

#### *NEC and Above Branch Facilities*

Facilities for the National Executive Committee and above branch representatives are agreed between CWU and BT Group Employee Relations. These are subject to regular review either annually or as agreed.

Credential forms for the National Executive Committee (NEC) and any associated sub-committees will be sent to BT Group Employee Relations from CWU Head Office (HO) or nominated central point within 7 days of the union's annual conference.

Credential forms for above branch representatives will be sent to BT Group Employee Relations from CWU HO or nominated central point. The date will be agreed at the time but will normally be around the second week in March.

BT Group Employee Relations will authorise facilities up to the agreed FTE levels for the NEC and above branch representatives for a period of 1 year, and notify CWU HO and the relevant Lines of Business accordingly.

#### **Branch Facilities**

##### *Determining the Amount of Paid Time Off*

The amount of paid time off for branch activities is expressed in hours (FTE quoted in brackets) and is directly related to membership heads within each branch. Where the membership of a branch falls below a threshold of 450 member facilities will be withdrawn unless a very exceptional justification can be provided.

A multiplier is determined by the size of branch and increased due to a higher amount of members causing increased administration and geographical spread. Please note that it is only BT members of the CWU and not Agency members who are counted. This multiplier is used to calculate the allowance for each branch:

<b>Members per Branch * (A)</b>	<b>Hours (B)</b>	<b>FTE (36hrs)</b>
0 - 500 = 28.8	(0.8 FTE)	
501 - 1000 = 36	(1 FTE)	
1001 - 1999 = 39.6	(1.1 FTE)	
2000 + = 43.2	(1.2 FTE)	

\* members in this context refers to BT employees only

Please use the following equation when calculating individual branch facility time:

A	=	Actual number of BT branch members
B	=	The multiplier (hours) as determined above
C	=	500 (the divisor that allows the branch hours to be calculated)

$$\frac{A * B}{C} = \text{Number of Branch Facilities Hours per Week}$$

*Example - The facility time applicable to a branch with 450 members would be calculated as follows:*

$$\begin{aligned} 0.8 \text{ (FTE)} * 36 &= 28.8 \\ 450 * 28.8 &= 12960 \end{aligned}$$

$$\frac{12960}{500} = \underline{\underline{25.92 \text{ Hours per Week}}} \text{ (0.7 FTE)}$$

*Example - The facility time applicable to a branch with 1500 members would be calculated as follows:*

$$1.1 \text{ (FTE)} * 36 = 39.6$$

$$1500 * 39.6 = 59400$$

$$\frac{59400}{500} = \underline{\underline{118.8 \text{ Hours per Week}}} \text{ (3.3 FTE)}$$

### ***Accreditation Procedure***

Within 7 days of the Branch AGM a credential form (Appendix A) for each elected Branch Officer will be completed and sent to the locally agreed central point, normally the line manager of the Branch Secretary or line HR Manager. The manager in question will authorise facilities up to the agreed level and return copies of the authorised forms to the Branch Secretary. Where the total facility time requested exceeds the agreed branch entitlement, managers must refer the facility time request to their Employee Relations Manager for authorisation.

Credential forms once authorised must be submitted to the Line of Business Employee Relations Manager so that the central Trade Union Representative database can be updated

Any disagreements concerning the allocation of facilities or accreditation of Branch Officers should be referred in the first instance to the Line of Business ER Manager, and if necessary to BT Group Employee Relations who have the final authority.

### **ii) Connect Arrangements**

Connect representatives will discuss their facilities with their line manager who will then submit a recommendation, via the credentials form, to the Line of Business Employee Relations Manager for agreement and authorisation. All credential forms must be submitted to the Line of Business Employee Relations Manager so that the central Trade Union Representative database can be updated

Managers needing advice on any aspect of the allocation, accreditation or management of Connect facilities should in the first instance contact their HR or Line of Business ER Manager, and if necessary BT Group Employee Relations who have the final authority.

### ***Paid Leave to attend Union Annual and Special Conferences***

Paid Leave will be allowed for two authorised delegates from each union branch to attend the union's annual conference. In addition paid leave will be allowed for up to two authorised delegates from each of Connect's recognised Network bodies to attend their annual conference subject to the agreement of BT Group ER.

Paid leave may be allowed on the same basis for special conferences with the prior authority of BT Group ER.

### ***Unpaid Leave***

Line managers may authorise requests for unpaid leave for activities which fall outside the scope of industrial relations activities as listed in the policy statement. Such activities may include

- day to day the running of the union,
- external affiliations - other than those specifically authorised by BT Group ER

- secondments
- representation of non-BT members
- attendance at the Union's Annual or Special Conferences other than as an authorised delegate

Line managers should consult their Line of Business ER team who may in turn consult BT Group ER on whether unpaid leave is appropriate in individual cases. The decision as to whether to allow unpaid leave should take account of operational requirements but should not be unreasonably withheld.

### **Conduct of Union Representatives**

Union Representatives are subject to the company's conduct and discipline rules and procedures as they would apply to any other BT employee.

Where a senior union representative is suspected of misconduct committed whilst carrying out their industrial relations activities the individual's line manager should seek advice from their HR manager or Line of Business ER team who will discuss the matter with the appropriate union headquarters before any action is taken. A similar procedure should be followed in the case of misconduct by other union representatives where prior discussion should be with the appropriate branch senior representative.

A Trade Union representative may on occasion wish to represent union views to the media. During any interview he/she must indicate his/her position as union spokesperson and give his/her name. A Trade Union representative must never indicate he/she is speaking on behalf of BT.

### **Management of Union Representatives**

#### ***General***

Detailed arrangements for the management of union representatives will be agreed at local or at Line of Business level. Generally union representatives will remain members of the teams from which they were elected. They should wherever practical be invited to team meetings and be managed in accordance with BT's performance and development framework. Line managers will be responsible for day to day management of union representatives including advice and support, authorisation of annual leave, sick reporting etc.

In order to maintain their skills full time representatives are encouraged to carry out occasional short periods of day to day BT work in their teams, including suitable periods of training or retraining. This should be arranged between the representative and his/her line manager having due regard to operational considerations.

Full time representatives are also be expected to attend and complete any mandatory company training as required for their role.

#### ***Sick Pay Arrangements***

Union representatives should advise their line manager if they become ill. Notification must be confirmed in writing as soon as possible in accordance with the normal procedures for the notification of sickness absence.

People who become ill during a period of unpaid leave for union activities will be regarded as at work for the duration of the illness and eligible for sick pay subject to the normal rules. On resumption they should make a fresh application for any outstanding unpaid leave required.

### ***DPR's***

Where union representatives spend all or a large proportion of their time on union duties, the company will take due account of relevant knowledge and experience gained, when assessing the individual's performance and potential. However, both parties recognise the difficulties that may be involved in completing such appraisals, and appraising managers will invite representatives to discuss their position prior to the appraisal being completed. The aim of such discussion will be to identify the managers who will be consulted regarding the writing of the appraisal, and to ascertain if the individual wishes to be considered for promotion.

Managers should bear in mind that Trade Union representatives may acquire or develop skills and competence, particularly in relation to written and oral communications, which they may not normally acquire in their usual operational role. These should be taken into consideration by nominated managers where practicable, thus making the identification of managers to be consulted all the more important.

The fact that employees are engaged on union representative duties will not detract from their opportunities for promotion. Where the promotion of such employees takes place, the promotion will be effected in accordance with the company promotion procedures and criteria which apply to other promotees at the level in question.

### ***Management of Connect Representatives***

The overwhelming preference of both BT and Connect is to discourage full-time release.

The time off required for union duties is likely to be subject to the same peaks and troughs as normal BT work, and it may be more appropriate to authorise an aggregate facility time allowance over a specified period rather than a regular weekly amount.

Line managers should do all they can to recognise the demands placed on Connect representatives through their normal BT work and their union duties, and where possible look to redesign the BT job accordingly.

In managing and assessing the performance of Connect representatives who are on part-time release line managers should take into account only the time spent on their BT role. Managers should recognise that the representatives are effectively working part-time and their objectives should be set and measured accordingly. Pay review and bonus recommendations should be based only on the representative's BT work, and managers should ensure that Connect representatives are not disadvantaged because of time spent on union duties.

Managers requiring further advice or guidance should in the first instance contact their Business Employee Relations team who may in turn contact Group Employee Relations if appropriate.

### ***Management of CWU Representatives on Part-Time Release***

Line managers are responsible for authorising leave for industrial relations activities. The activities for which leave is appropriate are listed in the "Guiding Principles" section of the policy. This list is not exhaustive but managers requiring advice should contact their line HR or Line of Business ER Manager in the first instance.

The arrangements for authorising and taking paid leave within the branch facilities allocation should be agreed locally. Managers will need to take operational requirements into account but requests for leave will not be unreasonably refused.

Managers may also consider requests for unpaid leave for activities not directly concerned with industrial relations, eg. the internal running of the union. Advice should be sought from the Line of Business ER Manager before unpaid leave for these purposes is authorised.

CWU representatives on part-time facilities should maintain a record of the various activities for which facilities time is used by completing the form at Annex B. Detail should include:

- Purpose of the time off
- Location
- The timing and duration of time off.

The completed forms should be available to the representative's line manager on request, or regularly as locally agreed, and will be used by union representatives and managers when reviewing the level of facilities allowed. Full time representatives are also encouraged to maintain a similar record of their activities.

### **Consultation between Union Representatives and Members**

Individual union members wishing to consult with their union representative may do so in work time with the permission of their line manager taking due account of operational requirements.

Similarly, union representatives must seek the permission of the line manager before consulting with a union member in work time. Permission will not be unreasonably withheld.

Branch meetings should normally take place outside working hours unless specifically authorised by the Line of Business or by BT Group ER.

Branch meetings and workplace consultative ballots may be held on BT premises with the permission of local managers.

### **Training**

BT accepts that in order to discharge their industrial relations responsibilities effectively union representatives should be adequately trained. The company will therefore allow paid leave for specified training courses. These will be agreed on a regular basis between the relevant union and BT Group ER at national level.

Part-timers attending union training courses for which paid leave has been authorised and on which full-time attendance is required will be paid for the additional hours subject to the normal rules.

### **Facilities other than Paid Time Off**

#### ***Office Facilities***

Union representatives should be provided with the necessary equipment to enable them to discharge their industrial relations responsibilities effectively. This may include telephone and fax, PC, filing cabinets, access to noticeboards and use of a private office wherever possible and practical.

When using any BT-provided facilities union representatives will be subject as individual employees to BT's conduct policies and rules whether or not they are acting in their capacity as union representatives.

#### ***Access to Building and Information***

Union representatives will be allowed access to buildings as required to carry out their union duties.

#### ***Subscriptions***



Union subscriptions may be deducted from source via the payroll process.

***Provision of Information and Access to New Entrants***

For the purpose of maintaining their records the BT Unions may occasionally request lists of joiners and leavers showing name, grade, OUC and work location together with the effective date. The information may be provided at Business Unit or branch level and requests must be addressed to the line HR or Line of Business ER Manager.

Union representatives will be allowed to address new entrants, and/or conduct recruitment/information campaigns on BT premises by prior arrangement with local managers taking operation requirements into account.

Neither of these facilities will be unreasonably refused.