# REPS Part 1 (key skills) online version

## Tutors’ notes

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| Current version | 1.2 |
| Date of last update | October 2024 |
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| Version history | * 1.1 |

## Introduction

This is the new training course for 2024. The aim is to offer training for branch committees delivered by Organisers and/or FTOs. This course has been piloted for face to face delivery but it could be run online if necessary, it should be followed up with a planning day or planning taking place over a series of meetings so that the branch create a bespoke strategic plan for 6 months to a year. I would suggest that Organisers/Officers hold the branch accountable to a review/evaluate process with an agenda item at each BEC.

The course can be delivered in half a day and is ideal for away days or AGM training sessions. The course could be broken down into three sessions for separate meetings if required but this is not ideal. I haven’t put any breaks in the slides but you should have at least one break, please place wherever you feel is right.

## How these notes work

There are 3 core resources associated with the course:

1. The PowerPoint presentation, which includes visual aids, but also maintains the structure/order of the course
2. Handouts: Strategic planning, Effective Organising Checklist, Action Plan
3. The tutor’s notes which explain the activities, suggest discussion-prompts and ‘index’ the other resources, tying the whole thing together.

(As tutors who’ve committed to delivering this course, we would suggest a small amount of preparation time ahead of the course to ensure you’re familiar with the session, activities and tutor instruction.)

## Tutor Notes/Course Structure

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| Slide Number | Notes | Resources |
| None/cover slide (1) | * Introduction * Housekeeping – (toilets, breaks, fire alarms etc) * Introductions – Who – where – experience of organising - what they want to get out of the course * Online – Raise hand, closed captions etc. Explain you may use break out rooms but that you will control the technicalities and they don’t need to worry. | Flip chart to capture what they want to get out of the course. |
| 2 | * Outline the purpose of the course and go over the learning objectives. Make sure that they are aware that they will be required at the end to produce an action plan. This may be divided into personal action points and actions for their branch. They should think about adding their strategic plan evaluation as an agenda item at the next BEC. |  |
| 3 | * Outline that Organising is a term that is much used but often means different things to different people. This session will explore what it means to you, your branch and in the wider world and what effective organising can achieve. |  |
| 4 | **Activity B –** get the attendees to individually write on a post it note what their definition of organising is. Collect in the notes and arrange in themes. You could just use a flip chart if that is all that is available and achieve the same thing. Highlight that there are no real right or wrong answers at this point, this is an exploration of what they know/understand/think.  Feedback – go through some of the themes and benefits  Point out that we will revisit what their answers later to see if they have changed. | Post-its  Flipchart  Pens |
| 5 | Hopefully the themes that come out of Activity B will support this summary but if not link what they have said to this and work in/add any good points. The point of this slide is to introduce attendees to the idea that organising is about building structures that will enable recruitment and encourage active members rather than just about recruiting. It also introduces the idea that organising is about building power for change. These structures also help with the servicing element of union work (casework) and make negotiations more meaningful. |  |
| 6 | Go through the slide, this is one way of outlining what organising entails. The discussion from the activity might add more. Be ready to incorporate these. |  |
| 7 | * This list will be familiar to anyone who has done Reps 1 but may be new to others. Remind/introduce why these are important in building the strength of their branch. You may want to add a note about density in dispersed branches if that is appropriate. * Explain that density is good but they need to think about getting members active and how they might do this (small asks, communications etc). * Constructive dialogue is essential between members and the branch leadership, get them thinking about their communications strategy and techniques and if this is an action point. * Does the membership represent the workforce as a whole or is there an action point there? Does the committee represent the demographics of the workforce in general? * This is a good point to remind them that they should be noting down action points. |  |
| 8 | **Activity C**   * Ask attendees to reflect on the list on the previous slide and score where their branch is now 2 points for good, 1 point for getting there, 0 points for not good or don’t know. How does their branch score? What reflections do they have? Feedback to the rest of the group and add actions to action plan. * Attendees could work as a group on the scoring and pool knowledge or work in small groups and then feed back. If this is happening online a breakout room or rooms could be used so they can talk away from the tutor. * Once attendees are started on this activity go back to previous slide. So they can reference |  |
| 9 | The value of organising is power! Explain how Organising and negotiations interlink and fuel each other. Plus explain that creating structures leads to increased power and therefore more likely change. Start to introduce why good communications structures are important to this and ask where they would build them into this cycle and how/what they would communicate. |  |
| 10 | Does the branch have a casework forum or a way of tracking themes in casework. This is useful as it may identify areas that can be addressed by campaigning or negotiation. Organising around issues is always easier and more productive and will demonstrate to non-members the value of joining beyond “in case you get into trouble”.  The pie chart is made up but shows that this imaginary branch could do some campaigning around bullying behaviours and perhaps some issues mapping on sickness. |  |
| 11 | This might be a good time to have a short break.  Introduction - In the next session we will look at three aspects of assessing what your branch looks like now and how to move organising forward:   * Workplace mapping and information gathering * Health checking your branch * Setting goals |  |
| 12 | Reps need to start to think beyond mapping, i.e. that all that is required is an exercise in finding out where members and non-members are (although this is one aspect of data gathering and still important as a start), and start to think about 360 degree information gathering that enables building structures and power. Start them to think about what information is needed to achieve their goals.  The language is important here – mapping has a distinct meaning to some reps especially more established ones hence why I have referred to information/data gathering as distinct from mapping. |  |
| 13 | Having said all that, this slide covers mapping! This is in a wider sense than they might be used to though.   * Introduce the concept of mapping as a basis of information gathering as a whole, talk through these elements. You could ask if they can think of any more or anything else it would be useful to know. For eg – in hybrid workplaces, the best days to talk to people, when all staff days are etc. * Word in **bold** are to identify that mapping is not just about members/non-members but also about other information gathering – these words are not exhaustive |  |
| 14 | Reinforcing that information gathering is a multi-layered and ongoing exercise and any outcomes should be living documents which inform your branch organising and recruitment plan, it should be re-visited and updated on a regular basis. Top tip: find someone who loves data and put them in charge of this. A reminder though, this is not a solo activity and should not just fall to one person.   * Points to make: * When you’re planning these sort of exercises, focus on the information that you need to get an accurate picture of who, where and why you’re organising. * Only collect the information that will help you to build the union and/or run a campaign. * Working out what information is needed to achieve your goal is a good way to begin your organising. * Things to consider: * Who are your colleagues – members & non-members * How is your workplace structured – physical boundaries * What teams work together – teams may cross physical boundaries * Are there any other unions present? * What are the working patterns – shifts/rotas/PT/FT * What are the social structures – breaktimes etc. * Who/where are your reps and activists |  |
| 15 | Some ideas for collating the information – can the attendees come up with any more?   * The map… some workplaces are physically dispersed and so mapping comes down to knowing exactly where people are based. It will also highlight gaps in membership if a known site is missing. * The table shows another way to map the workplace - the example is by department, a common way to map a workplace. * There may be other ways to break down workforce – operation v office based for example. These types of staff may have different issues and so be best organised together. * If you want to create a physical map there are various tools to do this – you can plot data by postcode in Excel or online using google maps |  |
| 16 | Another example of what could just be basic mapping but….   * This is a good way to introduce them to thinking outside the member/non-member box. Start with what do they notice about this picture, if necessary lead attendees along the route of who can talk to who. * What other information might they need to get (days people are in, team days etc) * What opportunities does this plan bring to mind (leaving information in communal areas etc) * Are there any issues apparent (why is Ryan in a cupboard behind the toilets!! – possible H&S issue; is Toby in a difficult workplace environment? etc) * How would they collate the information they get from talking to people? |  |
| 17 | Go through the points as a summary |  |
| 18 | * Group discussion on their experience so far of mapping. It is ok if they have never done it so make that clear. Hopefully they have a better understanding now of the usefulness of data gathering. * The goal setting exercise later in the course may add to their action plan |  |
| 19 | * The usual GDPR rules apply with regard to storing personal data. * Hold lists of members and non-members separately. * Paper lists the same as electronic lists * Individuals have a right to know what you have written – they are not likely to know the lists exists so access requests are unlikely to be an issue, but you should consider possibility. If you have rated people be prepared to defend this, so think about what it means when you write it down. * Remind them of Tracey Hunt if they are nervous about GDPR * Employers often hide behind GDPR to prevent organising but there are ways around this. E.g. if they have a members list and a staff directory, with a little work they can work out who the non-members are! |  |
| 20 | * Very quickly go over the slide. * If the employer is not forthcoming with lists of staff etc , there are some places that reps could look to find out more information |  |
| 21 | * Make the point that it is always easier to organise around issues that people feel strongly about. Part of the action plan might be to think about how the branch gathers those issues and how they ensure communications with members is not all one way. |  |
| 22 | * Introduce this as an extra aspect of information gathering. It is based on the techniques already discussed but applied to issues rather than members. The idea is that they can use the data gathered to investigate hotspots further, therefore strategically driving campaigning, and to evidence negotiations. |  |
| 23 | * **Body mapping** is around surveying members on any physical symptoms they are experiencing and seeing if there are any correlations or hotspots. This might be by work area or grade for example. This is a particularly useful if done with technicians but also useful in office settings. * **Workplace Mapping** is probably the technique they will use the most as it involves gathering issues from members and mapping this in a way that best presents the data for what the branch wants to achieve. Again this is usually by department or workplace but could beby grade/job title depending on what the branch want to look at. It could be both. |  |
| 24 | * Go through points, this is about reinforcing the point about active members. |  |
| 25 | * Tutors can use this or substitute their own example. You could substitute a slide with the below process and talk through it. There is a detailed account of the worked example in the tutor resources. * The process for this was: * Survey issued that gathers information on the issue (in this case symptoms of stress). This might involve a system of scoring (in this case based on management standards) * Survey was anonymous but ask participants to state their department/workplace/job title (whatever is the focus) * Have a small “reward” for filling in the survey (e,g, larger or eclusive merch item) * Members are tasked with distribution and collection in their area (ward or department in this case), also a series of stands promoting the survey in the main foyer (highlight that this was done a while ago – how might they use more electronic methods?) * Surveys scored and mapped against department etc. * Outcomes in real life example: * While most respondents stated they could cope with their stress levels analysis of the symptoms people identified showed a growing work-related stress problem that we were able to get management to take seriously, through the JNCC, and take preventative action. * Stress “hotspots” were identified in several departments and we were able to investigate these further. Some were to be expected (although still acted upon) such as ICU, A&E and Operating Theatres but some were unexpected such as CSSD which when investigated highlighted a bullying culture that could then be organised around as a separate issue. * On a side note the distribution of the campaign identified several “natural leaders” |  |
| 26 | * Once you have identified, using the health check, what reps and/or activists the branch needs they then need to think about who to approach and how. If traditional branch roles and structures don’t work for them then they need to think about what does. Splitting roles is not a bad thing! |  |
| 27 | * All strategic planning should have an eye to succession. Someone retiring should not come as a surprise and the branch should continue to function as if no-one has left. Ideally, the outgoing officer should mentor and support the incoming one before they go. Branches should always have an eye to moving members forward. |  |
| 28 | * This is about knowing who people in your workplace listen to. This is especially important when campaigning or building towards industrial action as these people will be the ones who get your message out and get others active in the campaign. They will foster confidence in others. * For further examples tutors can look at the GMB activity in Amazon or for more theoretical knowledge to Jane McAleavy |  |
| 29 | * Outline if attendees/branch officers already have a relationship with those identified as informal leaders they can: * arrange to meet with them to see if they might be willing to get involved * ask them what their concerns and issues are * find out what they know about their colleagues’ concerns. * If you don’t already have a relationship with them: * find out who their friends are and meet with them first * ask their friends about the best way to approach the informal leader * you may need to meet with a chain of people until you’re ready to meet with the informal leader. |  |
| 30 | * In their small groups ask attendees to see if they can identify anyone who fits the profile of an informal leader within their membership. Who do they know who might get a campaign message out or who might talk to particular groups of people. If they can’t identify anyone, ask them how might they find out and to plan how they are going to go about this? |  |
| 31 |  |  |
| 32 | * Introduce that this is a collaborative process that branch committees should enter into on a yearly basis and evaluate at regular intervals. * Talk them briefly about how the health check and plan forms work. The take away from this is that they should work as a group to fill it in for their branch at a planning day. The purpose of the training is to make them aware of the document and process and how it can be used. However, they should go on to discuss and complete as part of a branch development programme |  |
| 33 | * Example of part of a real life branch health check. Membership density for this branch was (at this point) 23%. The branch had just had a long standing Branch Sec step down due to health and personal reasons and an extensive restructure involving the redundancy of several reps. This is a branch in need of rebuilding! * Ask the group what their immediate thoughts are for the goal of this branch and some ideas for tactics to achieve that goal. |  |
| 34 | * Strategic Planning * This is an introduction to strategic thinking and planning. This is just one model (there is another example in the handout which is in the tutor resources. * The GROW model is one method of strategic planning but it works well as it is simple to follow. Introduce them to the stages of thinking by going through them one at a time. They will get to practice this in the next activity. * Goal – What do you want to achieve? * Reality – What is happening now. What do we need to know/find out? What resources do we have/need * Options – What ideas can we come up with to achieve the goal * Will – What can we commit to, who will do it and by when. This is the Who, Where, What, When, How of the plan |  |
| 35 | * This activity will introduce the attendees to solving a problem using an **action learning set** before planning a solution using the GROW model that they were introduced to in the last slide. * Identify the person who will propose an organising (if there is a Branch Secretary they would be a good choice) and then the rest of the group tease out some of the issues and things they need to know. Encourage them to ask open questions but it doesn’t matter if a few of them are closed (yes/no answers), the important thing is that they don’t offer options or solutions at this stage. * From this they should be able to identify some goals and realities to fit into the GROW model and come up with a basic plan. |  |
| 36 | * Another perspective on strategic planning. Go through the points on the slide briefly. |  |
| 37 | * This final session is the tying up of the training and bringing together all they have learnt as well as looking at their net steps – which should include a planning meeting to put into practice what they have learnt. |  |
| 38 | * The things listed are just suggestions, the branch should by this point have come up with their own action plan which they can now share. Organisers might want to collate some of the net steps on a flip chart and photograph or collect the data digitally for future reference. |  |
| 39 | * Revisit the Activity B |  |
| 40 | * Introduce this checklist as a further way of assessing where they are (reality) and where they want to be (goals) - it will resonate with some of the things they have talked about in the training e.g. issues mapping. * Copies will be in the tutor and resource areas of the training pages on the website |  |
| 41 | * If anyone wants any further reading then these are some of my suggestions – please feel free to add your own. The TUC guide is really good and branches can get up to 50 for free if they email the TUC. |  |
| 42 | * This is of course fluid but this is what we have piloted. The first two sessions were done in smaller groups with a branch leader in each group then fed back for the final session where each action/goal was put in priority order and a **timeline of actions** created. Organisers will want to keep checking back with the branch on this and it may be worth marking progress and evaluation as an agenda item at BECs |  |