

Union Work supported by 'Facilities Time' Sept 2015 – May 2016

Report to West Berkshire Schools Forum May 2016

### **What union officers do**

Union officers use 'facilities time' to work with members experiencing professional difficulties (casework) and to support groups of members either in individual schools or through negotiation and consultation with the local authority acting on behalf of its schools (collective work).

The casework dealt with by union officers falls into two broad categories: individual issues and collective issues.

#### **Individual issues**

The union officers spend most of the facilities time dealing with member teachers. Teachers in West Berkshire schools are able to contact their union representative directly by email or telephone. Issues raised by members in this way are known as casework. Casework can be divided into capability; disciplinary; grievance; and contracts, pay and conditions

Advice is often given on how the teacher can seek to resolve the matter for themselves. This is often successful, as local officers know individual schools well and are often able to advise teacher members how they can deal with a problem informally. However, there are a number of cases where the union officer has to make contact with school management, human resources provider or an LA officer directly. This may involve a face-to-face meeting. School policies confer a right for employees to be accompanied at most meetings by a union officer.

Capability, in its broader sense, now includes support through performance management as well as the formal capability procedure. The capability procedure may be invoked when the employer deems that an employee's performance is below that expected. An employee is entitled to be accompanied by a union representative at all stages.

Questions of capability also include incapability through illness. When an employee is referred for a consultation with the occupational health service medical professional an advice report is produced. The report is then discussed with the employee, who is entitled to be accompanied by his/her union representative.

Disciplinary, includes investigations of complaints and allegations as well as any formal hearings. An employee is entitled to be accompanied by a union officer at an investigative interview and at any hearing.

Grievance is where the employee lodges a grievance against their employer. Formal grievances are quite rare, but very time consuming for all concerned). Problems that might lead to a grievance are usually resolved through informal discussion between school management and the member, supported by their union officer either in person (or, more frequently, through prior discussion between the member and the union officer). An employee is entitled to be accompanied at meetings. Grievances can also be collective, but formal collective grievances are rare.

Contracts, Pay and Conditions issues such as pay determination appeals and questions of what teachers can be directed to do are becoming increasingly common.

#### **Collective Issues**

These include consultation on changes to working conditions such as pay policies, sickness absence policies, codes of conduct restructuring and redundancy.

This school year has seen an increase in the number of school restructurings accompanied by the risk of redundancy, as school budgets come under increasing pressure. The redundancy procedure is complex and often involves multiple meetings. The threat of redundancy can quickly undermine morale in a school and often the role of union officers is to reassure and support employees as well as ensuring that correct procedures are followed.

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### LA Issues

In addition to the above, time has been spent on consultation on policy and guidance documentation that the LA intends to issue to schools, research, planning, inter-union and internal union consultation.

### Activity

#### Number of contacts made to/by union officers

Casework	Email	Phone	In person	Meeting
Capability Issues <sup>1</sup>	26	12	11	6
Pay & Conditions	19	7	4	3
Contracts	4	3	0	1
Disciplinary Issues	5	5	3	2
Grievance	4	6	1	1
Redundancy**				20
Restructuring**				8

Collective	In Person
LA Meetings <sup>2</sup>	27**
Del Train	9
Personal	
Receive Train	14
Research	Not recorded
Union Briefing	15

<sup>1</sup> Includes formal support through appraisal

<sup>2</sup> Such as Joint Consultative Panel and Education Liaison meetings.

\*\* Number of attendances. Officers of several unions are normally present at each meeting

#### Notes

This is hierarchical, i.e. an email that leads to a meeting is not recorded.

**Email:** number of members supported by an exchange of emails

**Phone:** number of members supported through at least one phone call.

**In person:** number of members with whom a officer has met at least once

**Meeting:** number of members supported at a meeting with management.

**Hearing:** number of members supported at a hearing

Officers also spend time on internal union organisation such as attending, committee and general meetings. These activities are not undertaken in 'facilities time' Each union has a support infrastructure for its officers that includes reference resources as well as briefings and training courses included above.

#### Facilities payments to schools for 2015-16

Payments are made to the schools that employ each union's principal officer. The payments accord to a formula, which takes into account membership and also reflects a basic level of activity that every union needs to undertake.

Union	Total 2015/16	Officer
NASUWT	£15,944	Gary Upton
NUT	£15,208	Keith Watts
ATL	£12,645	Richard Hand
NAHT	£3,332	Richard Blofeld
ASCL	£2,393	Peter Fry
Total	£49,520	