

TUC Core Trade Union role

National Occupational Standards

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Overview

This unit is appropriate for you if your role involves:

1. Contributing to union campaigns.
2. Acting as a representative of the union.
3. Promoting the interests of the union.

The activities you are likely to be involved in:

4. Seeking the views of members, representatives and other groups on union campaigns.
5. Lobbying politicians and special interest groups.
6. Representing the views of members.
7. Acting as a union delegate or guest speaker in other organisations.
8. Ensuring that union policy is being followed during campaigns.

What the unit covers:

9. Supporting and promoting campaigns.
10. Representing the policies of the union and the views of members.

**Performance
criteria**

Support and promote campaigns

You must be able to:

- P1 Initiate campaigns which are appropriate to local circumstances and resources in line with agreed priorities.
- P2 Develop campaign plans in consultation with relevant persons which clearly identify the aims and purposes and include a realistic assessment of the likely outcomes and measures of success.
- P3 Arrange meetings at venues and times likely to attract the target audience with an appropriate level of attendance.
- P4 Lobby significant interests in a constructive manner to support the campaign objectives and provide relevant and accurate information.
- P5 Consult sources of relevant information and opinion on a regular basis and assess information gained against the required campaign outcomes.
- P6 Provide representatives, colleagues and senior officers of the union with accurate and up-to-date information on the progress and outcome of the campaign.
- P7 Commit adequate resources to support campaigns within budgetary limits.
- P8 Choose appropriate communications technology for the campaigns.

Represent the policies of the union and the views of your members

You must be able to:

- P9 Take forward the views of members appropriately.
- P10 Meet your commitments and responsibilities within agreed work priorities and resource constraints.
- P11 Follow union policy when corresponding with other organisations.
- P12 Make agreements to contribute to other organisations within resource constraints.
- P13 Confirm with senior officers of the union that participation in organisations is in the best interests of the union.
- P14 Make sure the approach taken in decision-making and representation of the union's position is consistent with union policy.

CFAUC1

Represent the union and promote its policies

- P15 Reserve judgement where decisions taken by the organisation potentially conflict with the policy of the representative's own union until appropriate advice and guidance have been received from senior officers of the union.
- P16 Identify and support opportunities to promote and advance the interests of the union.
- P17 Prepare accurate reports and summaries of representative activities in a suitable format and make them available within the union.

CFAUC1

Represent the union and promote its policies

Knowledge and understanding

The nature and role of union representation

You need to know and understand:

- K1 The balance of local and sectoral interests with union policy.
- K2 The effect of local circumstances on campaigns.
- K3 Effective methods for lobbying interest groups.
- K4 Issues of equality and diversity.

Principles and concepts

You need to know and understand:

- K5 Appropriate sources of information.
- K6 Differentiation of information and opinion.
- K7 Effective presentation of information.
- K8 The need on occasions to reserve judgement.
- K9 The value of campaign technology.

External factors influencing union representation

You need to know and understand:

- K10 Employment law and codes of practice on union representation and activities.
- K11 Economic and social factors influencing union activities.

CFAUC1

Represent the union and promote its policies

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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. Identifying potential and recruiting new union members.
2. Encouraging union membership.
3. Retaining union members.
4. Organising union members.

The activities you are likely to be involved in:

5. Mapping the workplace and identifying opportunities for recruitment.
6. Estimating the resources needed for the recruitment strategy.
7. Identifying appropriate opportunities for recruitment and retention activities.
8. Producing appropriate materials such as letters, leaflets, notices and posters.
9. Identifying potential members and making contact with them.
10. Conducting recruitment meetings.
11. Keeping membership records.
12. Maintaining regular contact with members.
13. Helping the union develop more effective recruitment procedures.

What the unit covers:

14. Developing a recruitment and retention strategy.
15. Preparing and presenting promotional information to potential members.
16. Maintaining contact with and information about members.
17. Advising on recruitment and retention.

CFAUC2

Develop, organise and contribute to the recruitment and retention of union members

Performance criteria

Develop a recruitment and retention strategy

You must be able to:

- P1 Identify local factors and potential tensions likely to affect recruitment and retention.
- P2 Apply national recruitment and retention policies.
- P3 Consult colleagues and members on appropriate and relevant materials which will maximise local recruitment.
- P4 Identify recruitment and retention opportunities and methods which are suitable for local circumstances.
- P5 Request information about potential members in line with agreed procedures where there are recognition agreements in the workplace.
- P6 Identify methods of contacting potential members where no recognition agreements exist.
- P7 Identify potential conflicts of interest and seek appropriate procedural guidance from specialists.
- P8 Negotiate and reach agreement with other unions to maximise potential membership and retain effective inter-union relations.
- P9 Make sure that recruitment systems and strategies are regularly monitored and reviewed for effectiveness in maintaining and processing membership.
- P10 Following monitoring and review make recommendations for improvements.

Prepare and present promotional information to potential members

You must be able to:

- P11 Make effective use of workplace opportunities for recruitment of individuals.
- P12 Deal promptly with individual and group enquiries about membership.
- P13 Provide individuals and groups with clear and accurate information on the features, advantages, benefits and rights associated with union membership.

CFAUC2

Develop, organise and contribute to the recruitment and retention of union members

- P14 Counter negative responses with persuasive arguments and relevant factual information.
- P15 Select and obtain recruitment materials.
- P16 Modify, package and present materials to meet the needs of different groups of members.
- P17 Arrange presentation and recruitment meetings at times and locations which maximise potential attendance.
- P18 Advertise meetings in visible and accessible locations.
- P19 Make presentations in a manner, style and pace which is suitable for the audience and which promotes goodwill.
- P20 Provide opportunities for potential members to ask questions and seek clarification.
- P21 Keep complete records of attendance and pass information on to the appropriate people.

Maintain contact with and information about members

You must be able to:

- P22 Make sure membership applications are processed promptly and accurately.
- P23 Monitor significant factors and characteristics of recruitment and membership including equality and diversity.
- P24 Make sure that recruitment and membership information is audited, regularly updated, summarised clearly and passed on to officers of the union and specialist departments.
- P25 Make sure that recruitment patterns and the results of campaigns are monitored, analysed and recorded.
- P26 Make sure significant variations in recruitment are summarised and details passed to the appropriate people.
- P27 Make sure appropriate levels of contact are maintained with members no longer in employment.

Advise on recruitment and retention

You must be able to:

- P28 Provide representatives with clear, accurate and up-to-date information

CFAUC2

Develop, organise and contribute to the recruitment and retention of union members

on recruitment and retention policy, priorities and national campaigns.

- P29 Encourage and assist representatives to select appropriate and relevant resources which will maximise local impact.

CFAUC2

Develop, organise and contribute to the recruitment and retention of union members

Knowledge and understanding

The nature and role of member recruitment and retention

You need to know and understand:

- K1 Workplace opportunities for recruitment.
- K2 Regional and national campaigns.
- K3 The benefits of membership.
- K4 Trade union priorities and national campaigns.
- K5 Local factors and potential tensions likely to influence the strategy.
- K6 Methods of consulting colleagues and members.
- K7 Recognition agreements.
- K8 Contact procedures where no recognition agreement applies.
- K9 Significant factors in recruitment.
- K10 How to present recommendations for improvement.

Principles and concepts

You need to know and understand:

- K11 Enquiry and application processing.
- K12 Sources of information and advice on recruitment and retention.
- K13 Appropriate recruitment materials.
- K14 Effective advertisement of meetings.
- K15 Effective presentations of recruitment information.
- K16 Use of local examples and issues.
- K17 Audience engagement methods.
- K18 Techniques to encourage questions.
- K19 Types of conflict of interest and how they may arise.

External factors influencing recruitment and selection

You need to know and understand:

- K20 Employment law and codes of practice which apply to union recruitment and retention.
- K21 Social and economic factors which affect the profile of members and potential members.

CFAUC2

Develop, organise and contribute to the recruitment and retention of union members

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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. Obtaining information about union services.
2. Using information to advise and inform members.

The activities you are likely to be involved in:

3. Providing information on general services to members.
4. Keeping information up to date.
5. Explaining information to members and giving them advice.

What the unit covers:

6. Obtaining, providing and interpreting information about union services.
7. Presenting information to groups of members.
8. Supporting and advising members on matters of personal concern.

**Performance
criteria**

Obtain, provide and interpret information about union service

You must be able to:

- P1 Identify and access sources of information and service provision of potential relevance to members.
- P2 Provide members with accurate summary information about relevant services.
- P3 Anticipate the potential needs of members for information and advice.
- P4 Clarify and interpret information upon request.
- P5 Establish and maintain an information system which contains up-to-date and accurate information on all services of relevance to members.
- P6 Respond promptly to requests for information and advice from members.
- P7 Give clear advice which is appropriate to the circumstances and which conforms to union policies and procedures.
- P8 Request information from specialist services when requests for information exceed your knowledge and responsibilities.

Present information to groups of members

You must be able to:

- P9 Select and prepare an appropriate location and facilities and equipment for the event.
- P10 Present accurate information in a manner and style which is appropriate to the needs and capacities of the target group and which takes into account equality and diversity issues.
- P11 Use appropriate presentation technology.
- P12 Encourage participants to ask questions, seek clarification and make comments at appropriate stages.
- P13 Provide clear and accurate supplementary and summary information as required to support key points.

Support and advise members on matters of personal concern

You must be able to:

- P14 Encourage members with problems to explain the nature of the problem.

CFAUC3

Provide information and advice to union members

- P15 Ask questions in a manner which avoids unnecessary embarrassment and which does not breach confidences.
- P16 Manage expectations about outcomes and explain factors that may influence them.
- P17 Encourage and support members to select and evaluate appropriate materials.
- P18 Obtain additional resources and pass them on to members where resolution of the problem is possible.
- P19 Encourage members to seek appropriate help and specialist advice.
- P20 Maintain contact with members who have been referred to other sources of advice and monitor the progress of the problem.
- P21 Disclose information to others only with the express permission of the membership.

CFAUC3

Provide information and advice to union members

Knowledge and understanding

The nature and role of information and advice

You need to know and understand:

- K1 Issues and circumstances which are likely to be important to the union, locality and members.
- K2 Specialist information and advice services.
- K3 How to adapt information to meet specific needs within union policy guidelines.
- K4 Different sources of advice and how to refer members to other agencies.

Principles and concepts

You need to know and understand:

- K5 Evaluation and summary of information.
- K6 Clear explanations and presentations.
- K7 Encouragement of audience participation and free communication without embarrassment.
- K8 Levels of confidentiality.

External factors influencing information and advice services

You need to know and understand:

- K9 Data protection and copyright legislation.

CFAUC3

Provide information and advice to union members

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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. The application of union procedures and systems.

The activities you are likely to be involved in:

2. Developing communication networks.
3. Working with groups to solve problems.
4. Organising and conducting meetings.
5. Producing written correspondence.
6. Recording and storing information.

What the unit covers:

7. Initiating and maintaining information and contact networks.
8. Leading informal meetings and group discussions.
9. Organising and servicing meetings and committees.

**Performance
criteria**

Initiate and maintain information and contact networks

You must be able to:

- P1 Join suitable networks which are compatible with union policy and representative interests.
- P2 Maintain a complete and up-to-date contact list and circulate appropriate and relevant information to selected contacts.
- P3 Participate in network groups which provide opportunities for personal and professional development.
- P4 Consult contacts on matters in which they have expertise.
- P5 Help to build teamwork within the union.

Lead informal meetings and group discussions

You must be able to:

- P6 Invite a suitable number of people appropriate to the context and purpose of the meeting.
- P7 Establish the purpose of the meeting with other group members at the outset.
- P8 Present information and summaries clearly and at an appropriate time.
- P9 Adopt a style of leadership which helps group members contribute fully.
- P10 Discourage unhelpful arguments and digressions.
- P11 Make sure decisions taken fall within the group's authority.
- P12 Record decisions accurately and pass on necessary information to the appropriate people.

Organise and service meetings and committees

You must be able to:

- P13 Decide whether a formal meeting is necessary or whether an alternative should be chosen using communications technology.
- P14 Prepare clear and accurate agendas, minutes and papers.
- P15 Encourage participants at meetings to make relevant and appropriate contributions.
- P16 Agree roles with those who have a formal part in the meeting.

CFAUC4

Contribute to the effective administration of the union

- P17 Identify actions arising from meetings and regularly monitor progress.
- P18 Reach a consensus on further action where necessary.
- P19 Co-ordinate meetings in a manner which follows rules of procedure.

Knowledge and understanding

The nature and role of union administration

You need to know and understand:

- K1 Alternative methods of networking.
- K2 Effective use of communication skills and technologies.
- K3 Networks which will be useful and how to make contact with them.
- K4 Barriers to participation and potential ways of overcoming them.
- K5 Communication skills and technologies for trade union duties.

Principles and concepts

You need to know and understand:

- K6 Effective use of union resources.
- K7 Alternatives to meetings.
- K8 Help from network members.
- K9 Different meetings to hold for different purposes.
- K10 Authority of meetings to make decisions.
- K11 The role of chairs of meetings and the relevant importance of agenda items.
- K12 The need for notes of meetings and agreed action points.
- K13 Keeping to time and to the point.
- K14 The role of rules and standing orders.

External factors influencing union administration

You need to know and understand:

- K15 Levels of confidentiality.
- K16 Data protection and copyright.

CFAUC4

Contribute to the effective administration of the union

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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. Encouraging full participation in the union's policy-making processes.
2. Interpreting and following policy decisions.
3. Collecting and providing feedback on policy implementation.

The activities you are likely to be involved in:

4. Providing members and representatives with relevant and up-to-date policy information.
5. Briefing members and representatives on formal processes and procedures.
6. Consulting with members and representatives on union policy and gaining their commitment.
7. Preparing guidance materials on union policy.
8. Responding to requests for information from officers of the union.
9. Identifying problems with policy implementation and recommending action.

What the unit covers:

10. Encouraging members and representatives to formulate, interpret and follow policy decisions.
11. Collecting, analysing and providing feedback on policy implementation.

**Performance
criteria****Encourage members and representatives to formulate, interpret and follow policy decisions***You must be able to:*

- P1 Make sure that relevant and up-to-date policy information is made available to members.
- P2 Provide members and representatives with information about democratic decision-making processes and encourage them to participate.
- P3 Brief and advise members on formal processes and procedures for the drafting and submission of motions.
- P4 Communicate changes to policy to other people.
- P5 Prepare clear guidance to support policy decisions which are likely to cause difficulties in local interpretation.
- P6 Make sure that, where policy does not cover particular circumstances, alternative guidelines are consulted and presented.
- P7 Where policy is not being followed, provide members with clear and accurate advice on the action necessary to conform.
- P8 Consult specialists when cases require expert interpretation and judgement and provide them with clear information.

Collect, analyse and provide feedback on policy implementation*You must be able to:*

- P9 Collect examples of implementation of policy and provide accurate summaries to appropriate people.
- P10 Investigate persistent and repeated problems which require policy clarification, and produce accurate summaries of the issues.
- P11 Discuss potential problems over the practicality of policy with colleagues and senior officers of the union and provide accurate summaries of conclusions reached.
- P12 Answer requests for information from officers of the union about policy requirements and amendments promptly, following appropriate consultation with colleagues and members.
- P13 Prepare reports of difficulties in implementing policies which contain relevant examples, case studies and analyses, together with realistic recommendations on how to clarify or amend policy guidelines.

Knowledge and understanding

The nature and role of policy making

You need to know and understand:

- K1 The procedures for policy-making and how to inform members and representatives about them.
- K2 Appropriate policy statement alternatives for your workplace.
- K3 Future policy requirements.
- K4 Analysis of policy issues.
- K5 Union policies and practices.
- K6 Methods of policy implementation.
- K7 Evaluation of feedback from members and representatives on the local implementation of union policies.

Principles and concepts

You need to know and understand:

- K8 Information sources.
- K9 The validity of information.
- K10 Appropriate sources of specialist advice.
- K11 The range of skills needed to communicate with members and representatives.
- K12 The types of difficulty which may arise and how to deal with them.
- K13 Consultation methods.
- K14 Methods to review policy.
- K15 Problems in implementing policy.

External factors influencing policy-making

You need to know and understand:

- K16 Codes of practice, agreements, procedures and legal requirements which affect workplace activities.
- K17 External economic and social factors influencing union activities.

CFAUC5

Support and contribute to the policy-making processes of the union

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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. Supporting the activities of the union.
2. Contributing to campaigns.

The activities you are likely to be involved in:

3. Developing campaign plans.
4. Producing briefing and publicity materials.
5. Providing colleagues with updates on the progress of campaigns.
6. Offering support to campaign organisers.
7. Providing feedback on the effectiveness of campaigns.

What the unit covers:

8. Contributing to the planning and implementation of activities and campaigns.
9. Contributing to activities and campaigns.

**Performance
criteria**

Contribute to the planning and implementation of activities and campaigns

You must be able to:

- P1 Initiate campaigns in line with agreed priorities and instructions appropriate to local circumstances and resources.
- P2 Develop campaign plans in consultation with relevant people, which identify clearly the aims and purposes of the campaign and include realistic evaluations of likely outcomes and measures of success.
- P3 Identify relevant and accurate briefing and publicity materials and make them available to representatives.
- P4 Make sure that, where briefing and publicity materials are non-specific, they are suitably modified to reflect local needs and issues.
- P5 Arrange meetings at times and in venues which are likely to attract the maximum attendance.
- P6 Make sure that oral presentations are clear and accurate, and identify the advantages and benefits to be gained from appropriate courses of action.
- P7 Make sure that appropriate sources of information are consulted regularly and assessed against required campaign outcomes.
- P8 Provide colleagues and officers of the union with accurate and up-to-date information on the progress and outcomes of campaigns, and make sure that key learning points are stored for future reference.

Contribute to activities and campaigns

You must be able to:

- P9 Support campaigns which are within the agreed policy of the union.
- P10 Offer appropriate support and advice to organisers of approved campaigns.
- P11 Make sure that advice offered is clear and accurate, conforms to union policy and does not compromise the position or credibility of the union.
- P12 Provide members with up-to-date and accurate information on the progress of campaigns which are receiving the direct support of the union.
- P13 Provide realistic and accurate feedback to campaign organisers on the local impact and effect of activities and campaigns.

Knowledge and understanding

The nature and role of workplace campaigns

You need to know and understand:

- K1 The types of campaign suitable for particular workplaces and how to evaluate their potential for success.

Principles and concepts

You need to know and understand:

- K2 Commitment to and engagement with workplace campaigns.
K3 Sources of campaign information.
K4 Suitable publicity materials and media.
K5 Methods of making meetings attractive.
K6 Communication within the union.
K7 The types of support that you are able to offer campaign organisers.

External factors influencing policy-making

You need to know and understand:

- K8 Codes of practice, agreements, procedures and legal requirements which affect workplace activities.
K9 Union policies for international working.

CFAUC6

Support activities and campaigns within the policies of the union

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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. Developing yourself in the role of a union representative.

The activities you are likely to be involved in:

2. Getting involved in appropriate networks.
3. Identifying your skills and learning needs.
4. Identifying priorities and managing your time.
5. Producing and monitoring your learning plan.
6. Reflecting on your practice in role as a union representative.

What the unit covers:

7. Building contact and information networks.
8. Choosing self-development programmes to support your role.
9. Deciding how to use the resources you have to do your job as a representative.
10. Developing, reviewing and evaluating your own development plan.

**Performance
criteria****Build contact and information networks***You must be able to:*

- P1 Take opportunities to get involved with networks where these are compatible with union policy and have something to offer you and the members.
- P2 Provide relevant information to contacts .
- P3 Attend network meetings which offer you opportunities to learn and exchange information.
- P4 Consult members of your network when you need help.
- P5 Keep up to date records of contacts and their areas of expertise.

Choose self-development programmes to support your own role*You must be able to:*

- P6 Identify the knowledge and skills you need to gain for your role.
- P7 Work out what your priorities should be and produce and update a plan of what you need to learn.
- P8 Include in your plan the skills you need to be an effective team member.
- P9 Find out about learning opportunities which will help you meet your needs, and make a case for attending suitable courses.
- P10 Allocate enough time to enable you to learn.
- P11 Review any educational programme you attend with a colleague.
- P12 Use the results of this review to update your learning plan.
- P13 Use the feedback about your knowledge, skills and performance to help you plan how to improve your performance as a representative.

Decide how to use the resources you have to do your job as a representative*You must be able to:*

- P14 List all your responsibilities in order of priority.
- P15 Allocate sufficient time to each of your key responsibilities, and allow for time you may need to respond to matters as they come up.
- P16 Be prepared to reallocate time in case of an emergency or other

unanticipated event.

P17 Agree with your colleagues to delegate appropriate parts of your work.

P18 Modify your time schedule to meet new and changing demands.

P19 Ask for help to improve your time management if necessary.

Develop, review and evaluate your own development plan

You must be able to:

P20 Develop a personal learning plan and regularly review it.

P21 Evaluate your own practice against set goals and targets.

P22 Select and use a range of valid and reliable evidence for assessing your work.

P23 Interpret the evidence with the support of others.

P24 Assess the impact of your behaviour and values on members.

P25 Use the evidence of your performance to reflect on your practice.

P26 Accept constructive criticism in a positive manner and assess it for its validity and importance.

P27 Revise your goals and targets as a result of reviewing all relevant evidence of performance.

Knowledge and understanding

The nature and role of self-development within the role of health and safety representative

You need to know and understand:

- K1 Appropriate methods of self-assessment.
- K2 Personal development plans.
- K3 The factors which impact on your ability to identify your learning needs.

Principles and concepts

You need to know and understand:

- K4 The use of Information and Communication Technology applications for personal development.
- K5 How to prioritise activities.
- K6 Use of time management techniques.

External factors influencing self-development

You need to know and understand:

- K7 Data protection legislation.
- K8 Current relevant debates relating to your area of responsibility, and the way in which they impact on your development needs.
- K9 Current government policy relating to your area of responsibility, and the way in which it impacts on your development needs.

CFAUC7

Enhance the role of the union representative

Developed by	Skills CFA
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Version number	2.0
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Date approved	March 2012
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Validity	Current
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUC7
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. Ensuring that your behaviour promotes equality of opportunity for all members.
2. Assisting in the elimination of discrimination.
3. Advising on how to promote equality of opportunity and contributing to diversity programmes.

The activities you are likely to be involved in:

4. Identifying and responding to discriminatory behaviour.
5. Challenging discrimination in others on the basis of race, sex, sexual orientation, disability, age, employment status, etc.
6. Obtaining specialist advice from union sources and specialist commissions.
7. Promoting equality of opportunity and representation within the union.

What the unit covers:

8. Promoting the elimination of discrimination.

**Performance
criteria**

Promote the elimination of discrimination

You must be able to:

- P1 Acknowledge and respect the choices, identity and beliefs of others.
- P2 Assist colleagues and members to examine ways in which their behaviour may demonstrate discrimination to others.
- P3 Seek appropriate advice, guidance and support where discriminatory behaviour and views are encountered within the union.
- P4 Seek appropriate advice and guidance if you are unsure of the effect your behaviour may have on another person.
- P5 Challenge inappropriate and discriminatory behaviour or remarks and explain the problems which they may cause in a clear and appropriate manner.
- P6 Report persistent inappropriate and discriminatory remarks and behaviour to a suitable authority and initiate corrective procedures.
- P7 Promote equality of opportunity and representation within the union and encourage members from under-represented groups to stand for election.
- P8 Keep abreast of legislation on discrimination.

Knowledge and understanding

The nature and role of equality of opportunity

You need to know and understand:

- K1 The value of diversity in the working environment.
- K2 Different types of discriminatory behaviour.
- K3 The needs of under-represented groups.

Principles and concepts

You need to know and understand:

- K4 Aspects of discrimination which may be significant in your workplace and how to challenge them.
- K5 Sources of advice and guidance.
- K6 The communication skills required to help people address their own behaviour.

CFAUC8

Promote equality of opportunity and fair treatment for all union members

Developed by	Skills CFA
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Originating organisation	TUC
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Original URN	CFAUC8
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. Advising on how to promote equality of opportunity and contributing to diversity programmes.
2. Monitoring the progress of equal opportunities policies and initiatives.

The activities you are likely to be involved in:

3. Promoting equality of opportunity and representation within the union.
4. Gathering and collating information on equality of opportunity practices in the workplace.
5. Evaluating existing policies and practices to enhance equality of opportunity.

What the unit covers:

6. Establishing and monitoring the progress of equal opportunity policies and initiatives.

CFAUC9

Establish and monitor equal opportunities policies and initiatives within the union and workplace

Performance criteria

You must be able to:

- P1 Make sure that information on equal opportunities and diversity policy and practice is kept up to date.
- P2 Establish initiatives to promote equality of opportunity and disseminate information to representatives and members about their existence and progress.
- P3 Encourage, assist and advise representatives on the promotion of initiatives for equality of opportunity and the elimination of discrimination.
- P4 Select, summarise and explain clearly, relevant information and make it available to representatives and members.
- P5 Select model equal opportunity and diversity agreements for inclusion in negotiations on working conditions and practices.
- P6 Develop and implement monitoring policies and processes which are appropriate to the structure of the workplace.
- P7 Advise representatives on how to encourage employers to implement equal opportunities monitoring policies and processes.
- P8 Hold regular reviews with colleagues, members and other appropriate parties to identify positive and negative examples of equality of opportunity.
- P9 Monitor instances of lack of opportunity for individuals and groups and initiate appropriate policies and procedures to address these.
- P10 Evaluate existing procedures and agreements for their contribution to the promotion of equal opportunity, and propose modifications to maximise opportunities for all members.
- P11 Make sure that evaluation reports for equality of opportunity procedures and implementation are provided regularly to officers of the union and specialists.

CFAUC9

Establish and monitor equal opportunities policies and initiatives within the union and workplace

Knowledge and understanding

The nature and role of equality of opportunity

You need to know and understand:

- K1 Union initiatives which will improve equality of opportunity and promote diversity in the workplace.
- K2 Existing equality of opportunity policies and procedures.
- K3 New policies and procedures.

Principles and concepts

You need to know and understand:

- K4 Monitoring arrangements for equal opportunities and diversity policies and agreements.
- K5 The need for accurate, comprehensive and current information concerning equal opportunities policies, practices and union initiatives.

External factors influencing equality of opportunity

You need to know and understand:

- K6 Equal opportunity legislation and codes of practice.

CFAUC9

Establish and monitor equal opportunities policies and initiatives within the union and workplace

Developed by	Skills CFA
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Originating organisation	TUC
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Original URN	CFAUC9
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives
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Overview

This unit is appropriate for you if your role involves:

1. Promoting the value of learning to those in the workplace.
2. Participating in trade union learning networks and initiatives.

The activities you are likely to be involved in:

3. Discussing new learning opportunities with employers and managers.
4. Making use of appropriate funding for local initiatives.
5. Encouraging colleagues and members to take advantage of available learning opportunities and resources.
6. Keeping up to date with learning initiatives.
7. Organising promotional activities and materials.

What the unit covers:

8. Promoting the value of learning to those within the workplace.
9. Promoting the value of learning within union networks and structures.
10. Supporting local and national policies, initiatives and campaigns which promote learning.
11. Preparing and presenting information to local interest groups and organisations.

**Performance
criteria**

Promote the value of learning to those within the workplace

You must be able to:

- P1 Discuss existing and new learning opportunities, resources and examples of good practice with employers.
- P2 Explain to employers and managers the benefits of, and ways to promote, learning to the workforce.
- P3 Use comments from employers and managers to develop your approach in getting and keeping their commitment to learning.
- P4 Maximise opportunities to explain the union funding initiatives to employers, managers, members and potential members.
- P5 Communicate with members and potential members about any proposed or actual changes in learning opportunities and resources available to them.
- P6 Encourage members and potential members to take advantage of available learning opportunities and resources.
- P7 Keep up to date with examples of good practice in the provision of learning opportunities and resources.
- P8 Identify groups of members and potential members to speak to about learning opportunities and resources.
- P9 Communicate regularly with members and potential members and seek their views on important issues involving learning.
- P10 Promote the advantages, benefits and social value of learning to members and potential members
- P11 Encourage members and potential members to identify the connections between learning and social inclusion.

Promote the value of learning within union networks and structures

You must be able to:

- P12 Keep up to date with learning and development issues by obtaining relevant information and consulting with appropriate contacts.
- P13 Consult with trade union colleagues regularly on key policies and priorities for developing learning opportunities, and seek their views on

how policies can be implemented.

- P14 Promote the advantages, benefits and social value of developing learning opportunities to representatives and members.
- P15 Promote the role of union learning representatives to trade unions and seek positive support for the role from union organisations.
- P16 Brief and advise those involved in negotiations about relevant learning and development issues and provide them with accurate summaries of information.
- P17 Encourage members to understand the importance and relevance of union policy on learning and its importance from a wider social and economic perspective.
- P18 Emphasise the importance of supporting union policy and guidelines, even if it does not have an immediate local benefit.

Support local and national policies, initiatives and campaigns which promote learning

You must be able to:

- P19 Support those initiatives and campaigns which are within the agreed priorities of the union, and offer advice and help to the organisers.
- P20 Make sure that the advice and information given to the organisers of initiatives and campaigns conforms to your union policy and does not compromise the position or credibility of the union.
- P21 Obtain relevant information and publicity material and pass these on to members.
- P22 Modify materials which are not specific to your circumstances so that they are relevant to local needs and issues.
- P23 Set up meetings for members at times and in places which are likely to attract the maximum attendance.
- P24 Present information clearly and set out the advantages and benefits of the initiatives and campaigns which you are supporting.
- P25 Canvass opinion regularly as the initiatives and campaigns progress to check that they are achieving the objectives.
- P26 Keep your members and the organisers up to date on the progress and results of any initiatives and campaigns which you and the union are supporting.

Prepare and present information to local interest groups and organisations

You must be able to:

- P27 Maximise opportunities to make contact with organisations and groups which are relevant to the interests of the union.
- P28 Check details with colleagues and officers of the union when asked to present information about the union.
- P29 Prepare draft answers to questions and topics given in advance and check them against policy.
- P30 Make sure that your own personal appearance and the style which you use is suitable for the type of organisation and audience when making presentations.
- P31 Present information in a way which presents the union and its policies to the best advantage and makes sense to the audience.
- P32 Answer questions positively and take opportunities to make further statements about the policy of the union.

Knowledge and understanding

The nature and role of learning within the workplace

You need to know and understand:

- K1 The advantages, benefits and social value of policy on learning and development.
- K2 Sources of information on learning and development.
- K3 How to identify, and operate within, trade union priorities and national campaigns.
- K4 How to network with other organisations and informed parties.
- K5 How to identify and access information on learning and development issues.
- K6 Methods of networking with trade unions and informed parties.

External factors influencing learning and the workplace

You need to know and understand:

- K7 Current government and trade union initiatives on lifelong learning.

CFAUL1

Promote learning and union initiatives

Developed by	Skills CFA
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Originating organisation	TUC
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Original URN	CFAUL1
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union learning; union learning agenda and strategy
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Overview

This unit is appropriate for you if your role involves:

1. Identifying learning issues.
2. Developing the learning agenda.
3. Developing a strategy for promoting learning.

The activities you are likely to be involved in:

4. Consulting with members to identify their individual learning needs.
5. Identifying local learning needs and circumstances.
6. Quantifying the resources needed to meet local learning needs.
7. Consulting with employers about learning and skills strategies.
8. Assisting in local negotiations to obtain learning opportunities for members.
9. Reviewing progress and achievement of learning strategies.

What the unit covers:

10. Consulting members on learning needs and provision of learning opportunities.
11. Obtaining and summarising information to support the development of a strategy for learning.
12. Leading and assisting in negotiations in the workplace.
13. Monitoring and reviewing the implementation of strategies and policies designed to promote learning.

**Performance
criteria**

Consult with members on learning needs and the provision of learning opportunities

You must be able to:

- P1 Choose methods to consult with members which are democratic and relevant to the workplace, industry and the needs of particular interest groups.
- P2 Set up methods of consultation and participation which meet local needs and circumstances and conform to union's guidelines, policies and procedures.
- P3 Check that the systems set up for consultation are working by assessing the success of the systems, collecting the views of members and using this information to adapt and improve them.
- P4 Work out what resources (including time, funding, equipment and administrative costs) are needed to maintain the process of consultation, listing your requirements clearly, and pass the request on to the union.
- P5 Find out who might be willing to be involved in the learning representative function and encourage and support them to participate.
- P6 Keep in regular contact with local branch officers to keep them up to date with information about the workplace.

Obtain and summarise information to support the development of a strategy for learning

You must be able to:

- P7 Find out where to obtain relevant information which will be useful in supporting discussions and negotiations with employers.
- P8 Consult information sources regularly and note down any important details and references for future use.
- P9 Consult with employers about learning and skills strategies that meet their business needs.
- P10 Consult regularly with members, other learning representatives and officers of the union to find out what agreements about learning access and resources are being made locally, and in similar industries nationally.

Develop a learning agenda and strategy for the promotion of union learning

P11 Consult with specialists by making an accurate and clear request.

P12 Note information which might be helpful in national negotiations for learning, and pass it on to officers of the union.

Assist in negotiations in the workplace

You must be able to:

P13 Agree a negotiating strategy which is suitable for the type and subject of negotiation.

P14 Prepare a written submission of the union position, justified by supporting information and statistics.

P15 Accept an employer response if it meets the acceptable best result you have agreed with the negotiating team.

P16 Reject unacceptable employer responses in a manner which leaves the door open for continued discussions and negotiations.

P17 Make sure that you understand the reasons for a negative employer response and use persuasive arguments and any additional information that is available to pursue the argument.

P18 Ask questions to test the employer's position, the consistency and resilience of the arguments, and probe for possible movement.

P19 Follow the normal procedures and conventions for negotiations, which may be broken – but only where you believe that this may further the claim and where this has been agreed in advance with the negotiating team.

P20 Summarise and record all points of agreement.

P21 Decide what alternative action is possible within the terms of legislation and the existing procedure agreement where no agreement is possible.

P22 Keep notes of the results of the negotiation and pass these on to people who will find them useful.

Monitor and review the implementation of strategies and policies designed to promote learning

You must be able to:

P23 Set up and conduct a regular review to find out how policy to promote learning is being implemented.

P24 Assess progress and quantify achievements and pass the information on

to the union.

- P25 Investigate persistent and repeated problems in implementing policy and make clear and accurate notes about the problems.
- P26 Identify cases where policies are impractical in the workplace, and produce recommendations for changes in consultation with members.
- P27 Pass on records of discussions and notes about problems to the union and ask for help and clarification.
- P28 Consult with members when officers of the union ask you about the implementation of policy to promote learning, and answer the enquiry as fully and accurately as possible.

Knowledge and understanding

The nature and role of learning within the workplace

You need to know and understand:

- K1 The advantages, benefits and social value of policy on learning and development.
- K2 Sources of information on learning and development issues.
- K3 Trade union priorities and national campaigns.
- K4 Networking with other organisations and informed parties.

Principles and concepts

You need to know and understand:

- K5 Sources of information on examples of good practice.
- K6 Appropriate methods of consulting with members and employers about learning needs.
- K7 Sources of information about learning opportunities.
- K8 Factors to take into account within the negotiating strategy.
- K9 Roles of team members.

External factors influencing learning and the workplace

You need to know and understand:

- K10 Current government and trade union initiatives on lifelong learning.

CFAUL2

Develop a learning agenda and strategy for the promotion of union learning

Developed by Skills CFA

Version number 2.0

Date approved March 2012

Indicative review date March 2015

Validity Current

Status Original

Originating organisation TUC

Original URN CFAUL2

Relevant occupations Trade Union Representatives and Professionals

Suite TUC Core Trade Union role

Key words union learning; union learning agenda and strategy

Overview

This unit is appropriate for you if your role involves:

1. Supporting members to achieve their learning objectives.

The activities you will be likely to be involved in:

2. Consulting with members to identify their individual learning needs.
3. Providing members with clear information about learning opportunities.
4. Helping members plan their learning plans.
5. Giving members support during the learning process.
6. Helping learners review their progress.

What the unit covers:

7. Supporting members to identifying their learning needs.
8. Supporting members to developing and actioning learning plans.
9. Advising and supporting individual members to manage their own learning.
10. Helping learners to review their progress.

**Performance
criteria**

Support members to identifying their learning needs

You must be able to:

- P1 Check with members their views about their needs and suitable types of learning opportunity.
- P2 Listen carefully and ask questions in a way which does not cause any unnecessary embarrassment.
- P3 Give clear and relevant information in a way which enables members to make informed decisions about their needs.
- P4 Identify learning needs which are based on valid and reliable judgements of all relevant information.
- P5 Make suggestions about learning needs and a plan of action for achieving them.
- P6 Distinguish between short-term, long-term and priority needs.
- P7 Discuss and suggest ways of meeting learning needs which takes into account members' personal circumstances.
- P8 Pass on to appropriate people suggestions on ways of meeting the identified learning needs.
- P9 Keep records of the help given to members.

Support members to develop and action learning plans

You must be able to:

- P10 Offer guidance and support in a way which encourages the self-development and independent decision-making of the learner.
- P11 Develop, with the learner, a realistic plan which identifies the objectives to be achieved.
- P12 Develop, with the learner, a plan which identifies clearly and accurately the learner's expectations.
- P13 Identify, with the learner, the most appropriate way to put the plan into action.
- P14 Estimate the resources that will be required to put the plan into action and identify how the resources will be obtained.
- P15 Promote equality of opportunity and good practice in all aspects of the

plan.

- P16 Identify the roles and responsibilities of the people and organisations who will be involved in delivering the plan.
- P17 Agree, with the learner, arrangements for reviewing progress and judging the success of the plan.
- P18 Record the learning plan with the learner.

Advise and support individual members to managing their own learning

You must be able to:

- P19 Identify and agree learners' needs for advice and support.
- P20 Provide enough accurate information and advice to learners about the skills and resources they will need to manage their own learning.
- P21 Assess whether learners are capable of managing their own learning.
- P22 Provide learners with appropriate support to enable them to develop their ability to manage their own learning.
- P23 Explain the level of on-going support which will be available to learners in managing their own learning.
- P24 Refer learners to other sources of support where you cannot meet their needs.
- P25 Give advice which avoids bias and takes into account learners' personal circumstances.
- P26 Give support in a way which encourages the self-development and independent decision making of the learner.
- P27 Explore any difficulties which learners are having in managing their learning and provide appropriate advice.

Help learners to review their progress

You must be able to:

- P28 Assess the progress of learners based on accurate formative assessments and learners' views about their progress and learning programme.
- P29 Gather information and interpret that information in a way which is justifiable, avoids bias and is checked with learners.
- P30 Encourage learners to feel comfortable in expressing their views on their progress.

- P31 Match the information on progress against agreed learning objectives and identify which learning objectives have been achieved.
- P32 Give feedback on progress in a positive and encouraging manner.
- P33 Identify and agree new learning needs, aspirations and learning objectives.
- P34 Identify and agree the benefits of proceeding with learning and development, and identify any changes needed to the learning programme.
- P35 Agree review dates with learners.
- P36 Make and keep records of the help given to members.

Knowledge and understanding

The nature and role of learning needs and opportunities

You need to know and understand:

- K1 Learners' expectations of learning and development.
- K2 Learning and development plans.
- K3 Promotion of learning to assist individuals to achieve their objectives.
- K4 Trends in the workplace and projections of skill needs.

Principles and concepts

You need to know and understand:

- K5 Learning requirements of members.
- K6 Learning and development opportunities available locally.
- K7 Appropriate sources of funding for learning.
- K8 Learning styles.
- K9 Equal opportunities and non-discriminatory practice.
- K10 Learning plans.
- K11 Promoting learner autonomy.
- K12 Factors which impact on learners' ability to manage their own learning.
- K13 Individuals' needs for advice, guidance and support.
- K14 Progression routes and further learning opportunities.
- K15 Encouragement to participate.
- K16 Modifications needed to the learning programme.

External factors influencing learning needs and opportunities

You need to know and understand:

- K17 National and union debates on the role of learning and development.
- K18 Employment and equal opportunities legislation and good practice.

CFAUL3

Support union members in planning and managing their learning

Developed by	Skills CFA
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Version number	2.0
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Originating organisation	TUC
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Original URN	CFAUL3
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union learning; union learning agenda and strategy
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Overview

This unit is appropriate for you if your role involves:

1. Assisting members to access learning opportunities.
2. Representing members' learning interests.

The activities you are likely to be involved in:

3. Gathering and collating learning information.
4. Encouraging members to make use of learning opportunities.
5. Representing learner interests with authorities and agencies.
6. Maintaining a learning information base.
7. Negotiating access to learning for members.

What the unit covers:

8. Obtaining and providing information on learning opportunities.
9. Supporting and encouraging current and potential learners to access learning opportunities.
10. Setting up and maintaining a stock of learning resources.
11. Representing the interests of members by negotiating access to learning opportunities.
12. Developing and improving local learning opportunities.

Performance criteria

Obtain and provide information about learning opportunities

You must be able to:

- P1 Find out what information is available and where it can be obtained.
- P2 Identify people who can provide information on a regular basis and request details which are useful for the workplace.
- P3 Identify the features and details of learning opportunities which are available locally and online.
- P4 Explain the information clearly and simply to people who are unfamiliar with it.
- P5 Summarise complicated information and pass useful information on to members who have expressed an interest in learning.
- P6 Set up a system to store and classify the information and keep it up to date.
- P7 Regularly update union notices and posters and remove any information which is no longer relevant.
- P8 Make sure that any information given is accurate and current.
- P9 Pass on requests and queries to people who can provide advice if you are unsure of the answer.

Support and encourage current and potential learners to access learning opportunities

You must be able to:

- P10 Identify barriers in access to learning opportunities and find ways to overcome them.
- P11 Encourage members who have not recently been involved in active learning to identify the benefits of gaining access to learning opportunities.
- P12 Give accurate and up-to-date information so that learners can make informed decisions about learning opportunities and possible qualification routes.
- P13 Provide learners with unbiased information which is based on the opportunities available, any constraints, and the learner's preferences.

- P14 Promote equality of opportunity in access to learning opportunities.
- P15 Suggest learning opportunities which take account of previous learning and experience and advise on a suitable learning route.
- P16 Act on behalf of the learner by representing their interests with people who have the authority to resolve problems of access.

Set up and maintain a stock of learning resources

You must be able to:

- P17 Obtain learning resources including online resources which are suitable for local learning needs.
- P18 Check that the language, style and format of the learning resources are appropriate to the needs of learners and are designed to promote equality of opportunity.
- P19 Use learning resources, particularly those which have been produced by external organisations, according to the requirements of copyright law.
- P20 Store learning resources in a suitable manner and in a way which helps learners to use them.
- P21 Provide learners with clear and accurate information on how to find and use the resources.
- P22 Make resources available at times which suit the needs and circumstances of learners.
- P23 Get feedback from users on the suitability of the learning resources and the way in which the resources were made available.
- P24 Record members' usage of learning resources.

Represent the interests of members by negotiating access to learning opportunities and resources

You must be able to:

- P25 Identify and prioritise cases where action is needed to improve members' access to learning opportunities and resources.
- P26 Prepare background materials for negotiators which clearly summarise the issues.
- P27 Prepare cases on behalf of members for presentation to decision makers.
- P28 Present clear arguments during negotiations and meetings and

Enable union members to access learning opportunities and resources

emphasise the benefits of improving members' access to learning opportunities and resources.

- P29 Note down what is agreed and check with everyone concerned that you have an accurate record.
- P30 Note down and check disagreements and differences in the interpretation of the information presented.
- P31 Decide what action could be taken within legislation, agreed procedures and union policy if the result is not acceptable.
- P32 Take time to review and assess what has been gained and what has been learned after.
- P33 Present a case, and note these points down for future use and to help others.

Develop and improve local learning opportunities

You must be able to:

- P34 Identify the range of learning opportunities and resources available locally.
- P35 Assess the level and quality of learning opportunities and resources available locally.
- P36 Identify areas where existing learning opportunities and resources could be used or adapted to meet local needs.
- P37 Identify areas where there are no learning opportunities and new opportunities are needed.
- P38 Estimate the likely costs of adapting existing learning opportunities and provide new opportunities.
- P39 Identify key areas for negotiation with decision makers about learning opportunities, resources and access.
- P40 Make contact with decision makers and suggest changes to existing opportunities, and propose new opportunities and resources to meet identified local needs.
- P41 Suggest ways in which access to learning opportunities could be improved.
- P42 Monitor the usage of learning opportunities by learners and obtain feedback on the quality of their learning experience.

Knowledge and understanding

You need to know and understand:

The nature and role of learning needs and opportunities

- K1 Sources of information on learning opportunities.
- K2 Research on learning opportunities.
- K3 Appropriate sources of funding for learning.
- K4 Appropriate web sites.
- K5 Learning and development opportunities available locally.
- K6 Learning and development opportunities available through the employer.
- K7 Workplace trends which may affect the projections of skills needed locally.
- K8 Workplace agreements on access to learning opportunities.
- K9 Situations which give rise to difficulties in accessing learning opportunities and resources.
- K10 The benefits of improved access to learning opportunities and resources.

Principles and concepts

You need to know and understand:

- K11 Choice of learning technology.
- K12 Use of the terminology, acronyms and concepts associated with lifelong learning.
- K13 Barriers to learning, their impact on current and potential learners, and ways of overcoming the barriers.
- K14 Options for learning programmes, qualifications and progression routes.
- K15 Types of information and advice learners are likely to need.
- K16 Issues of equality of opportunity and non-discriminatory practice in relation to promoting learning and achievement.
- K17 Copyright requirements relating to the use of learning resources.

External factors influencing learning opportunities

You need to know and understand:

- K18 Identify and access sources of funding to meet the costs of learning.
- K19 Ways of conforming to copyright requirements relating to the use of learning resources.
- K20 Apply the requirements of data protection legislation.

CFAUL4

Enable union members to access learning opportunities and resources

Developed by	Skills CFA
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Version number	2.0
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUL4
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union learning; union learning agenda and strategy
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Overview

This unit is appropriate for you if your role involves:

1. Setting priorities and balancing own workload.
2. Organising, chairing and servicing union meetings.

The activities you are likely to be involved in:

3. Deciding on priorities in the light of union policies and guidelines, special campaigns and local circumstances.
4. Chairing committees and managing debates on topics.
5. Preparing documents for meetings.

What the unit covers:

6. Setting priorities and monitoring the allocation of time.
7. Chairing formal meetings and conferences.
8. Organising and servicing meetings.
9. Presenting information to meetings.

**Performance
criteria**

Set priorities and monitor the allocation of time

You must be able to:

- P1 Identify and prioritise key responsibilities and associated activities using agreed criteria.
- P2 Allocate time to achieve key responsibilities and associated activities.
- P3 Maintain a realistic balance between continuous processes and single events and allocate sufficient time to each.
- P4 Maintain an up-to-date diary which contains realistic allocations of time against activities and which is available to support staff.
- P5 Make allowances for contingencies and re-allocate or postpone activities to meet changing needs.
- P6 Inform others of changes to planned activities as soon as possible and offer alternative times and dates.
- P7 Inform senior officers of the union when there is insufficient time for priority activities and suggest how the problem may be resolved.
- P8 Evaluate activities which are outside the responsibilities of the officer or which can be achieved by other means.
- P9 Monitor the allocation of time to activities and make modifications to meet new and changing demands.
- P10 Choose appropriate communication technology.

Chair formal meetings and conferences

You must be able to:

- P11 Brief guest speakers on their expected roles and contributions.
- P12 Set timings for agenda items in advance and keep to them unless unanticipated priorities demand otherwise.
- P13 Welcome new attendees and give guidance on the intended business of the meeting.
- P14 Encourage participants to make relevant contributions at appropriate times in the agenda.
- P15 Monitor discussions and summarise key points at appropriate times in a manner which fairly represents all relevant views.

- P16 Advise participants on the relevance, timing and relative priority of their contributions in a manner which maintains trust and contributes to the successful outcome of the meeting.
- P17 Chair meetings in a manner which follows the rules of procedure and good practice.
- P18 Summarise decisions accurately and formally conclude items when sufficient discussion has taken place to fairly represent all relevant views.

Organise and service meetings

You must be able to:

- P19 Evaluate venues to make sure access and participation for all, and make recommendations for modifications as necessary.
- P20 Make sure agendas, minutes and papers are clear, in an appropriate format, and circulated to all attendees in sufficient time for them to read and respond to agenda items.
- P21 Agree specific roles with those who have a formal role in the meeting.
- P22 Make sure that invited guest speakers are given realistic advance notice of meetings and are accurately briefed on their expected roles and the length and format of their contribution.
- P23 Make sure that the chair is briefed on all relevant agenda items.
- P24 Monitor discussions and accurately record key points and decisions in a format suitable for subsequent interpretation and transcription.
- P25 Produce clear and accurate minutes of meetings and circulate them to authorised recipients within accepted time limits.
- P26 Identify actions arising from the meeting and monitor progress towards achieving them.

Present information to meetings

You must be able to:

- P27 Provide clear and accurate information and present it in a manner and style which is appropriate to the needs of the target audience and any special needs of particular groups.
- P28 Present information to non-union audiences in a manner which communicates union policies to best advantage.
- P29 Use appropriate presentation technology.

- P30 Encourage participants to ask questions, seek clarification and make comments at appropriate stages in the presentation.
- P31 Provide clear and accurate supplementary information to support key points as necessary.

Knowledge and understanding

The nature and role of personal communication and time management

You need to know and understand:

K1 Priorities and balance of conflicting needs.

Principles and concepts

You need to know and understand:

K2 Procedures for formal meetings.

K3 The needs of different target groups, including any special needs.

K4 Appropriate format for documents.

K5 Effective time management systems.

K6 Methods of encouraging participation.

K7 How to handle disruptive behaviour.

K8 The various roles of participants at meetings.

K9 Appropriate presentation technology.

External factors influencing communication

You need to know and understand:

K10 Health and safety and access requirements of meeting venues.

CFAUO1

Maintain the efficiency of local union organisation

Developed by	Skills CFA
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Version number	2.0
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Validity	Current
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUO1
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	Union organisation; union structures and processes; presenting union information to the media; democratic organisation
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Overview

This unit is appropriate for you if your role involves:

1. Setting up local union structures.
2. Supporting local union organisation in the workplace.
3. Supporting representatives.
4. Advising on participative processes.

The activities you are likely to be involved in:

5. Encouraging members to become representatives.
6. Providing information and support to local representatives and members.
7. Consulting members and representatives.
8. Helping representatives develop appropriate local procedures and strategies.
9. Giving support on collective bargaining.
10. Assisting local representatives to use ballots, meetings and publications as part of the consultation process.

What the unit covers:

11. Planning and monitoring the development of workplace organisation.
12. Providing resources and advising representatives.
13. Promoting, supporting and advising on participative structures and processes.
14. Promoting and enlisting support for priority collective bargaining issues.
15. Developing and promoting a workplace collective bargaining agenda.

**Performance
criteria****Plan and monitor the development of workplace organisation***You must be able to:*

- P1 Identify potential representatives and provide them with support.
- P2 Make sure that representatives are consulted and advised regularly.
- P3 Monitor local organisation on a regular basis and propose improvements to representatives where necessary.
- P4 Develop appropriate strategies to improve workplace organisation.
- P5 Agree strategies with representatives which take into account known and anticipated changes impacting on the workplace.
- P6 Provide union committees with information on the strength of workplace organisation.

Provide resources and advise representatives on systems and strategies*You must be able to:*

- P7 Circulate information relevant to local representatives.
- P8 Maintain an information system for union policies, procedures and agreements.
- P9 Make sure that requests for advice from representatives are answered promptly and appropriately.
- P10 Make sure that where enquiries exceed your knowledge and responsibility requests are made to specialist services.
- P11 Provide representatives with accurate information on recognised procedure agreements and structures, and make modifications to meet local circumstances.

Promote, support and advise on participative structures and processes*You must be able to:*

- P12 Support representatives on how to develop processes for gathering members' views.
- P13 Help representatives to develop participative structures which relevant to local circumstances.
- P14 Make recommendations for resources to establish and support

participative structures.

P15 Identify potential branch officers and provide them with support.

P16 Encourage potential branch officers to stand for election.

P17 Provide senior officers of the union with feedback on the effectiveness of participative structures.

Promote and enlist support for priority collective bargaining issues

You must be able to:

P18 Regularly consult sources of information and identify key factors likely for future policy formation and priority collective bargaining issues.

P19 Recommend sources of information to support collective bargaining to representatives.

P20 Make sure that coherent arguments are provided to encourage support for and to promote collective bargaining issues.

Develop and promote a workplace collective bargaining agenda

You must be able to:

P21 Identify opportunities to promote of key priorities.

P22 Consult representatives on the priorities of local members.

P23 Consult and advise representatives on methods of assessing employer and member attitudes, membership strength and resolve.

P24 Review the collective bargaining agenda against emerging priorities and issues and agree with representatives.

P25 Provide persuasive arguments about the rationale, purpose and impact of specific policies for dissemination to members.

P26 Advise representatives on appropriate processes of consultation and persuasion which will maximise membership acceptance and support for the collective bargaining agenda.

Knowledge and understanding

The nature and role of workplace organisation

You need to know and understand:

- K1 Union policy and benefits for local needs.
- K2 How to evaluate local organisation.
- K3 How to evaluate future developments.
- K4 Participative structures and processes which are relevant to local structures.
- K5 Methods of encouraging participation.
- K6 Strategies for improving workplace organisation and how to select and implement them.

The nature and role of collective bargaining

You need to know and understand:

- K7 The union's policies on collective bargaining.
- K8 Sources of information for identifying key factors affecting collective bargaining.
- K9 Employment law and codes of practice which apply to collective bargaining.

External factors influencing workplace organisation

You need to know and understand:

- K10 Employment law and codes of practice which apply to union representation and activities.
- K11 External economic and social factors influencing union activities.

CFAUO2

Develop and support union organisation in the workplace

Developed by	Skills CFA
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Version number	2.0
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Validity	Current
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUO2
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union organisation; union structures and processes; presenting union information to the media; democratic organisation
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Overview

This unit is appropriate for you if your role involves:

1. Setting up structures and processes to encourage participation.

The activities you are likely to be involved in:

2. Agreeing facilities and resources to perform duties with employers.
3. Identifying potential representatives and encouraging them to stand for election.
4. Developing appropriate methods of participation and consultation with members.

What the unit covers:

5. Contributing to the development of the local representative strategy.
6. Contributing to participative structures and processes.

**Performance
criteria**

Contribute to the development of the local representative strategy

You must be able to:

- P1 Identify and agree sufficient facilities and resources with employers to enable representatives to perform their duties in the workplace.
- P2 Identify potential representatives and provide them with information, support and advice.
- P3 Encourage potential representatives to stand for election.
- P4 Monitor local representative strategy and practice on a regular basis and correct any variances from union policy and procedure.
- P5 Review likely future developments in relevant occupational sectors and identify significant implications for future employment opportunities and conditions.
- P6 Identify and make use of specialist information on relevant future trends.
- P7 Agree appropriate and realistic strategies with colleagues and officers of the union which take account of known and anticipated changes in social and economic conditions.
- P8 Implement, monitor and modify strategies to meet new and emerging information and trends.

Contribute to participative structures and processes

You must be able to:

- P9 Identify information sources and examples of participative structures which are relevant to local needs and circumstances.
- P10 Identify and adopt valid democratic consultative processes to identify members' views and the needs of particular interest groups.
- P11 Identify and adopt appropriate methods of participation which meet membership needs and union guidelines, and which are realistic in terms of local circumstances.
- P12 Monitor and evaluate participation methods selected.
- P13 Set and evaluate participative systems and evaluate them against appropriate criteria and feedback from members.
- P14 Make clear and justifiable recommendations and requests to officers of

CFAUO3

Plan, implement and co-ordinate local union participative structures and processes

the union for resourcing to support and establish participative structures.

P15 Identify potential branch officers and provide them with support and advice.

P16 Encourage potential branch officers to stand for election.

P17 Maintain regular contact with branches and provide branch officers with clear and accurate advice on branch organisation, administration and finance.

CFAUO3

Plan, implement and co-ordinate local union participative structures and processes

Knowledge and understanding

The nature and role of local representative structures

You need to know and understand:

- K1 Appropriate sources of information and advice on your industry.
- K2 Employment opportunities and emerging trends in social and economic matters.
- K3 Resources and facilities needed for participative structures and processes.
- K4 Local needs and characteristics which affect the choice of participative methods.
- K5 Interest groups and their impact on participative structures and processes.
- K6 Alternative participative structures and technologies.
- K7 Specialist information and advice services.

Principles and concepts

You need to know and understand:

- K8 Effective communication and consultation structures.
- K9 Alternative methods of participation.

External factors influencing participative structures

You need to know and understand:

- K10 Identify and apply relevant employment law and codes of practice and negotiation in relation to participative structures.

CFAUO3

Plan, implement and co-ordinate local union participative structures and processes

Developed by Skills CFA

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Validity Current

Status Original

Originating organisation TUC

Original URN CFAUO3

Relevant occupations Trade Union Representatives and Professionals

Suite TUC Core Trade Union role

Key words union organisation; union structures and processes; presenting union information to the media; democratic organisation

Overview

This unit is appropriate for you if your role involves:

1. Preparing and presenting information to the media.
2. Acting as a representative and promoting the interests of the union.

The activities you are likely to be involved in:

3. Making contacts in the media.
4. Maximising media opportunities.
5. Responding to media questions.
6. Promoting the union message when involved with the media on the radio or television and during live and recorded interviews.

What the unit covers:

7. Preparing and presenting information to the media.

Performance criteria

You must be able to:

- P1 Choose which print, broadcast and online media are appropriate.
- P2 Maximise opportunities to make contact with the media within resource constraints.
- P3 Establish and maintain up-to-date and lists of media contacts.
- P4 Confirm requests to present information on behalf of the union with senior officers of the union.
- P5 Draft appropriate answers to advance questions and topics and ensure consistency with, and conformity to, union policy.
- P6 Make sure that personal appearances on visual media are appropriate to the type of programme and intended impact.
- P7 Make sure that broadcast media presentations are clear and accurate and are presented in a manner and style which is appropriate to the audience, and which presents the union and its policies to maximum advantage.
- P8 Answer questions positively and take appropriate opportunities to promote union policies and positions.
- P9 Respond appropriately to intimidatory and hostile questioning and return to the agreed topic.
- P10 Make appropriate interventions where necessary to provide a union view to balance contrary views.

Knowledge and understanding

Principles and concepts

You need to know and understand:

- K1 Effective presentation.
- K2 Choice of print, broadcast and online media.
- K3 Media contact lists.

CFAUO4

Prepare and present information to the media

Developed by	Skills CFA
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUO4
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union organisation; union structures and processes; presenting union information to the media; democratic organisation
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Overview

This unit is appropriate for you if your role involves:

1. Leading members, activists and other full-time colleagues as a workplace representative or full-time official/officer within a trade union organisation.

The activities you are likely to be involved in:

2. Leading committees, groups, consultations and bargaining units.

**Performance
criteria****Encourage others to participate and input to consultations and initiatives***You must be able to:*

- P1 Encourage the innovation and creativity of others within your area of responsibility.
- P2 Gain the trust and support of colleagues.
- P3 Use a range of methods to communicate with members and the union.
- P4 Respond to enquiries effectively and in a timely manner.
- P5 Provide information in a way which can be understood by others.
- P6 Engage, communicate and consult effectively with members, activists and other full-time colleagues.
- P7 Make sure that the processes for decision-making are open, transparent and informed by union policy.
- P8 Work with members to develop a vision of the future.
- P9 Develop an effective plan to implement the vision.
- P10 Include union policies, practices and procedures in your plans.
- P11 Consult on and communicate the vision and implementation plans effectively to others.
- P12 Regularly review and revise the implementation plan as a result of feedback or changes in union policy.

Build relationships with outside bodies*You must be able to:*

- P13 Identify opportunities to build appropriate and effective relationships with outside bodies.
- P14 Represent the union effectively to external organisations and at meetings/events.
- P15 Seek to build partnerships.

Develop leadership*You must be able to:*

- P16 Lead your members effectively through any difficulties, challenges and conflict.

- P17 Use appropriate leadership styles.
- P18 Make sure that you delegate effectively.
- P19 Motivate and support members in your area of responsibility to achieve their objectives.
- P20 Make sure that the achievements of members are recognised.
- P21 Provide members with opportunities for development.
- P22 Obtain regular feedback on and review your performance.
- P23 Make sure that your leadership style recognises equality and diversity.
- P24 Help build the union team.

Knowledge and understanding

You need to know and understand:

- K1 The differences between management and leadership.
- K2 Principles of leadership.
- K3 The structure and decision-making processes of the union.
- K4 Your own remit and those of others.
- K5 Your accountability – to members and the union.
- K6 How to communicate effectively.
- K7 How to listen effectively.
- K8 The different methods of communication available to you.
- K9 National and local union initiatives which impact on your area.
- K10 The potential impact of change on others.
- K11 Models and methods available for managing change.
- K12 How manage other people's expectations during change.
- K13 How to delegate effectively.
- K14 How to motivate members.
- K15 The networks and contacts available to support your work.
- K16 How to identify potential future leaders.
- K17 How to support members to achieve their potential.
- K18 The union's policy on equality and diversity.

Developed by	Skills CFA
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Validity	Current
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUO5
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union organisation; union structures and processes; presenting union information to the media; democratic organisation
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Overview

This unit is appropriate for you if your role involves:

1. Supporting and advising on representation of interests.

The activities you are likely to be involved in:

2. Identifying appropriate information to use in individual cases of representation using expert sources for additional information.
3. Supporting members in the case of grievances, employer's disciplinary procedures or employment conditions and practices dealing with issues such as equal opportunity or job evaluation.
4. Helping members to come to decisions about the likely outcome of cases and what action to take assisting members and representatives to prepare submissions.

What the unit covers:

5. Advising on the validity and credibility of cases.
6. Providing information and resources to enable representatives and members to prepare cases.

Support and advise on the representation of individual union member and collective interests

Performance criteria

Advise on the validity and credibility of cases

You must be able to:

- P1 Collect information in sufficient detail for an accurate evaluation to be made.
- P2 Consult appropriate specialists as required and provide them with clear, valid and accurate information.
- P3 Analyse valid and reliable case information against appropriate criteria and evaluate for realistic success.
- P4 Make a realistic evaluation of the likely outcome.
- P5 Give justifiable reasons to representatives and members when the union does not feel that the case is considered to be valid or credible.
- P6 Provide realistic advice on alternative approaches to pursuing the issue.
- P7 Make sure that relevant information about the case which has a likely bearing on future cases is recorded accurately, stored securely and passed on to interested parties.

Provide information and resources to enable representatives and members to prepare cases

You must be able to:

- P8 Advise members and representatives on the information required to maximise the success of the case.
- P9 Summarise the key points and common features from similar cases and precedent, and pass promptly to representatives.
- P10 Advise representatives and members on effective methods and approaches for presenting case information.
- P11 Make sure that draft written case material is coherent and logical, and make appropriate suggestions to improve its effectiveness, if required.
- P12 Assist representatives and members to prepare oral submissions which are accurate and present the argument effectively.
- P13 Review cases with representatives following submission and resolution, and identify key learning points.

CFAUR1

Support and advise on the representation of individual union member and collective interests

Knowledge and understanding

The nature and role of individual and collective representation

You need to know and understand:

K1 The union's policy on representation.

Principles and concepts

You need to know and understand:

K2 Effective advice.

K3 Cases requiring expert interpretation.

K4 Evaluations of likely outcomes.

K5 Appropriate alternative approaches available in cases where the union decides not to support the case.

K6 Coherent and logical presentation of facts and arguments.

K7 Feedback on oral submissions.

External factors influencing individual and collective bargaining

You need to know and understand:

K8 Relevant employment law and codes of practice and negotiation in relation to representation in the workplace.

CFAUR1

Support and advise on the representation of individual union member and collective interests

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Validity Current

Status Original

Originating organisation TUC

Original URN CFAUO6

Relevant occupations Trade Union Representatives and Professionals

Suite TUC Core Trade Union role

Key words representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service

Overview

This unit is appropriate for you if your role involves:

1. Promoting and gaining support for collective bargaining issues.
2. Contributing to the broader collective bargaining agenda.

The activities you are likely to be involved in:

3. Identifying policies and trends in relation to collective bargaining.
4. Consulting members on specific demands and priorities.
5. Gaining member understanding and support for agreements.
6. Taking opportunities to broaden collective bargaining agreements.

What the unit covers:

7. Promoting and enlisting support for collective bargaining issues.
8. Contributing to the development of a workforce collective bargaining agenda.

Contribute to the formulation and implementation of the union collective bargaining strategy

Performance criteria

Promote and enlist support for collective bargaining issues

You must be able to:

- P1 Regularly consult appropriate and relevant sources of information on key policies, priorities and trends which are likely to contribute to future policy.
- P2 Identify and obtain supportive information and resources.
- P3 Consult members regularly on key policies and priorities and identify realistic opportunities for implementation.
- P4 Actively promote the advantages, benefits and social value of policies.
- P5 Use relevant and persuasive arguments to emphasise the importance of active support for policies and priorities.

Contribute to the development of a workforce collective bargaining agenda

You must be able to:

- P6 Identify realistic opportunities to facilitate the promotion of key activities.
- P7 Consult members on specific demands and priorities.
- P8 Identify and adopt valid methods for assessing employer and member attitudes, membership strength and resolve.
- P9 Review the collective bargaining agenda regularly against emerging priorities and issues, and agree appropriate amendments and changes in priority with colleagues and officers of the union.
- P10 Provide additional relevant information to members which contains accurate and persuasive background information about the rationale, purpose and impact of specific policies.
- P11 Identify and adopt valid and appropriate processes of consultation and persuasion which will maximise membership acceptance and support for the collective bargaining agenda.
- P12 Make sure that any difficulties are summarised accurately and referred to relevant specialists and officers of the union for advice.

CFAUR2

Contribute to the formulation and implementation of the union collective bargaining strategy

Knowledge and understanding

The nature and role of collective bargaining

You need to know and understand:

- K1 Union policies on collective agreements.
- K2 Priorities and issues for collective bargaining relevant to your workplace.
- K3 Benefits of collective bargaining policies and practices.

Principles and concepts

You need to know and understand:

- K4 Regular consultation with members.
- K5 Ways of promoting the advantages of policy on collective bargaining and how to use them.
- K6 Employer and member attitudes to collective bargaining.

External factors influencing collective agreements

You need to know and understand:

- K7 Relevant employment law and codes of practice which apply to union representation and activities in relation to collective bargaining.
- K8 Economic and social factors influencing union activities.

CFAUR2

Contribute to the formulation and implementation of the union collective bargaining strategy

Developed by	Skills CFA
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Validity	Current
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUR2
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview

This unit is appropriate for you if your role involves:

1. Securing union recognition with employers.
2. Maintaining union recognition rights.

The activities you are likely to be involved in:

3. Identifying best current practice in recognition rights from within the union movement.
4. Making presentations to employers promoting the benefits of recognition.
5. Consulting with members and representatives on recognition rights and agreements.
6. Negotiating where recognition agreements are being challenged.
7. Encouraging appropriate consultative processes in the workplace.

What the unit covers:

8. Identifying and making contact with employers.
9. Maintaining contact with employers and promoting the benefits of union recognition.
10. Planning and monitoring the development of consultative structures and processes.

**Performance
criteria****Identify and make contact with employers***You must be able to:*

- P1 Identify, analyse and summarise relevant information to advance recognition rights.
- P2 Identify the status and level of representation in target workplaces and confirm with appropriate authorities.
- P3 Make sure that written communications with employers are accurate, promote respect and trust, and clearly describe the advantages and benefits of recognition.
- P4 Make sure that presentations to employers are conducted in a manner, pace and style designed to promote goodwill and to emphasise the benefits of union organisation.
- P5 Provide employers with accurate additional background information on preferred procedure agreements and structures which are acceptable to meet local circumstances.
- P6 Identify and summarise potential conflicts with other unions and refer promptly to appropriate authority.

Maintain contact with employers and promote the benefits of recognition*You must be able to:*

- P7 Identify and agree the resources and facilities required to enable representatives to perform their duties in the workplace.
- P8 Provide employers with up-to-date and accurate information about preferred procedure agreements and union priorities.
- P9 Consult with representatives regularly about evidence of employer commitment to recognition rights and opportunities to extend them.
- P10 Maintain communications with employers which promote respect and trust.
- P11 Obtain a rationale from employers for proposed modifications to recognition agreements and communicate this to representatives.
- P12 Refer any proposed modifications to agreements made by employers to an appropriate authority if outside union policy or own responsibility.

- P13 Produce complete and persuasive arguments supporting the benefits of continued recognition and present them to employers.
- P14 Consult appropriate agencies when additional information is needed.
- P15 Prepare complete and accurate reports of cases where employers have changed recognition agreements and refer them promptly to an appropriate authority.

Plan and monitor the development of consultative structures and procedures

You must be able to:

- P16 Encourage employers and representatives to establish consultative machinery which is appropriate to the size and scope of the bargaining units involved.
- P17 Prepare appropriate and relevant documents which are approved by union decision-makers involved in consultative arrangements.
- P18 Consult representatives regularly on the suitability and effectiveness of existing consultative arrangements.
- P19 Assess the effectiveness of existing consultative arrangements against appropriate criteria and make them available within the union.
- P20 Make appropriate co-ordinating arrangements with other unions who have a legitimate interest in consultative mechanisms.
- P21 Provide union members serving on consultative forums with relevant, accurate and realistic information and advice.

Knowledge and understanding

The nature and role of recognition rights

You need to know and understand:

- K1 Local circumstances which are likely to affect agreements.
- K2 Benefits of recognition to employers.
- K3 Relevant information and advice for representatives on recognition rights and agreements.
- K4 Types of consultative machinery relevant to different workplaces.
- K5 Relevant procedural agreements.

Principles and concepts

You need to know and understand:

- K6 Sources of information.
- K7 Effective presentation.
- K8 Facilities and resources to support representatives.
- K9 Effectiveness of consultative arrangements.
- K10 Co-ordinating arrangements with other unions which are appropriate to particular circumstances.

External factors influencing recognition rights

You need to know and understand:

- K11 Relevant employment law and codes of practice which apply to union representation and activities.
- K12 External economic and social factors influencing union activities.

CFAUR3

Develop union recognition rights with employers

Developed by	Skills CFA
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Validity	Current
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUR3
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview

This unit is appropriate for you if your role involves:

1. Negotiating collective agreements with employers.
2. Promoting collective agreements to employers and members.
3. Helping to deliver collective agreements.

The activities you are likely to be involved in:

4. Presenting preferred recognition agreements to employers.
5. Negotiating modifications to agreements.
6. Seeking opportunities to extend recognition and bargaining rights.
7. Keeping members informed and committed to agreements.
8. Setting up procedures and systems to deliver agreements.

What the unit covers:

9. Promoting the industrial relations benefits of collective agreements to employers and members.
10. Supporting and assisting the development of structures and procedures for collective agreements.
11. Contributing to the negotiation of collective agreements with employers.

**Performance
criteria**

**Promote the industrial relations benefits of collective agreements to
employers and members**

You must be able to:

- P1 Monitor employer levels of commitment to continued recognition of bargaining rights.
- P2 Identify opportunities to extend rights to information, consultation and participation.
- P3 Provide employers with up-to-date and accurate information about the union's preferred procedure agreements for recognition.
- P4 Collect complete and accurate information about changes to agreements on bargaining rights proposed by employers and make it available to colleagues and officers of the union.
- P5 Make sure that approaches to employers which are intended to avoid negative changes contain complete and persuasive details of the benefits of continued recognition of bargaining rights.
- P6 Consult with appropriate authorities and agencies when additional information and advice on de-recognition is required.
- P7 Make sure that members are kept informed of any developments which may affect bargaining rights.
- P8 Encourage members to support and persuade others to support the local retention and extension of bargaining rights.

**Support and assist the development of structures and procedures for
collective agreements**

You must be able to:

- P9 Encourage employers to establish joint machinery which is appropriate to the size and scope of the bargaining unit.
- P10 Prepare appropriate and relevant agendas and agree them with union decision makers and members involved in joint arrangements.
- P11 Make sure that appropriate co-ordinating arrangements are made with other unions who have a legitimate interest in joint mechanisms.
- P12 Assess regularly and accurately the effectiveness of consultative

Establish and maintain union collective agreements with employers

arrangements against appropriate criteria, and provide assessments to interested parties.

- P13 Provide union members serving on consultative forums with relevant, accurate and realistic information and advice.

Contribute to the negotiation of collective agreements with employers

You must be able to:

- P14 Conduct formal presentations in a style, format and manner designed to promote goodwill.
- P15 Make sure that written communications are accurate and designed to promote respect and trust.
- P16 Explain fully and accurately the implications and normal operating practices contained in agreements on request.
- P17 Make sure that modifications to agreements requested by employers, which are outside your responsibilities and the policy of the union, are documented accurately and referred promptly to an appropriate authority for ratification.
- P18 Prepare complete and accurate documents which are checked for consistency of interpretation and forward them promptly for signing.
- P19 Widely promote the existence of newly signed agreements.

Knowledge and understanding

You need to know and understand:

The nature and role of collective agreements

- K1 Consultative machinery which would be suitable for your workplace and how to set it up.
- K2 An appropriate consultative agenda for your workplace.
- K3 Arrangements with other unions and how to establish them.
- K4 Union policies on recognition agreements, bargaining rights and collective agreements.
- K5 Reasons which justify extended bargaining rights and how to present them.
- K6 Changes in bargaining rights which might affect your workplace.
- K7 Changes or suggestions which your employer might make affecting bargaining rights.

Principles and concepts

You need to know and understand:

- K8 Key components of union policies.
- K9 Agreed policies and procedures.
- K10 Responsibility for taking final decisions.
- K11 The type of information which specialists might need in order to provide support and advice.
- K12 How to keep members informed.

External factors influencing collective agreements

You need to know and understand:

- K13 Relevant employment law and codes of practice which apply to union representation and activities in relation to collective agreements.
- K14 Economic and social factors influencing union activities.
- K15 Appropriate international employer and union bodies.

CFAUR4

Establish and maintain union collective agreements with employers

Developed by	Skills CFA
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Version number	2.0
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUR4
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview

This unit is appropriate for you if your role involves:

1. Helping resolve industrial disputes.

The activities you are likely to be involved in:

2. Maintaining contact with members and their wishes regarding the continuation of disputes.
3. Updating members on the progress of the dispute.
4. Advising members on the legal issues involved in the dispute.
5. Following the correct balloting procedures.
6. Keeping appropriate officers of the union up-to-date with events in the dispute.
7. Agreeing appropriate publicity materials and a media strategy with colleagues.
8. Recognising the circumstances in which to recommend arbitration and conciliation.

What the unit covers:

9. Working closely with members during the dispute.
10. Following disputes procedures and processes.

**Performance
criteria****Work closely with members during the dispute***You must be able to:*

- P1 Collect the views and attitudes of members to the continuation of disputes from appropriate sources, and continuously evaluate and update them as the disputes progress.
- P2 Advise members on the legal framework applying to disputes and the legal consequences of proposed action.
- P3 Make sure that suitable support for members involved in disputes is made available within the constraints of union policy and available resources.
- P4 Maintain regular contact with members and disseminate promptly relevant information about improved offers and changed circumstances.

Follow dispute procedures and processes*You must be able to:*

- P5 Make sure that ballots for the initiation of industrial action meet legal and procedural requirements and that membership data is accurate and regularly reviewed.
- P6 Accurately collate and summarise the results of consultations and present them to the employer.
- P7 Agree appropriate publicity materials and a media strategy with colleagues.
- P8 Provide other officers of the union with regular, accurate and up-to-date information about the progress of disputes and potential disputes and seek approval for specific actions within the policy and rules of the union.
- P9 Maintain regular contact with employers in dispute, and investigate and propose options and alternatives for resolving the dispute which are likely to be acceptable to members.
- P10 Make sure that the conduct of disputes is reviewed regularly against accepted codes of practice, agreements, procedures and legal requirements.
- P11 Inform dispute organisers of any breaches in procedure and advise them

of legal consequences.

- P12 Provide other unions which have a potential interest in the outcome of the dispute with relevant, regular, up-to-date and accurate information about progress.

Knowledge and understanding

The nature and role of workplace negotiations

You need to know and understand:

- K1 How to identify and select from appropriate sources, information relevant to workplace disputes.
- K2 How to develop a suitable strategy for your workplace.
- K3 How to identify and apply the union policies and practices in relation to workplace disputes.
- K4 How to select appropriate methods of monitoring the views and expectations of members.

Principles and concepts

You need to know and understand:

- K5 How to identify realistic and acceptable best results in relation to disputes.
- K6 How to evaluate the consistency and resilience of the employer's position and to probe for possible movement.
- K7 How to identify when to suggest temporary adjournments at appropriate points in the negotiation.
- K8 How to identify the kinds of outcomes which might set precedents.

External factors influencing workplace negotiations

You need to know and understand:

- K9 How to identify and work within the codes of practice, agreements, procedures and legal requirements which affect workplace disputes.
- K10 How to identify and follow the legal requirements and procedures for conducting ballots.

CFAUR5

Contribute to the resolution of industrial disputes in the workplace

Developed by	Skills CFA
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Originating organisation	TUC
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Original URN	CFAUR5
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview

This unit is appropriate for you if your role involves:

1. Planning, preparing for, and concluding workplace negotiations.

The activities you are likely to be involved in:

2. Creating and sustaining a negotiating team.
3. Identifying and gathering information relevant to the negotiations.
4. Preparing and recording agreements.
5. Researching the local context of the negotiation.
6. Getting draft agreements ratified.
7. Drafting formal letters of acceptance.

What the unit covers:

8. Obtaining information to support workplace negotiations.
9. Finalising and recording workplace agreements.

Performance criteria

Obtain information to support workplace negotiations

You must be able to:

- P1 Identify and consult regularly sources of useful and relevant information and accurately summarise information.
- P2 Extract valid and reliable economic and financial information on relevant organisations, and analyse, interpret and summarise it accurately.
- P3 Make sure that information is regularly updated.
- P4 Collate, analyse and summarise accurately, relevant and up-to-date social and demographic information.
- P5 Consult colleagues regularly to provide accurate local information on comparative terms and conditions.
- P6 Consult with appropriate specialists and provide them with unambiguous requests.
- P7 Refer relevant information for use in national negotiations.

Finalise and record workplace agreements

You must be able to:

- P8 Prepare agreements which meet all relevant criteria in a suitable format and make accurate modifications to any documents, existing agreements and procedures which are affected by the new agreement.
- P9 Clearly summarise and note key points of concern, agreements which have the potential to set precedent, compromise national strategies or affect other local agreements, and submit documents to appropriate specialists and officers of the union for advice and adjudication.
- P10 Refer draft agreements to the appropriate union body for ratification.
- P11 Draft formal letters of acceptance which are accurate and in a suitable format, and communicate promptly to employers.
- P12 Record accurately the content and processes leading to agreements in the internal information systems, and make records available to colleagues and officers of the union.

Knowledge and understanding

The nature and role of workplace negotiations

You need to know and understand:

- K1 Information appropriate to workplace negotiation.
- K2 Union policies and practices in relation to workplace negotiations.

Principles and concepts

You need to know and understand:

- K3 Circumstances under which normal procedures and conventions might be broken.
- K4 Union procedures for ratification of agreements.

External factors influencing workplace negotiations

You need to know and understand:

- K5 Codes of practice, agreements, procedures and legal requirements which affect workplace negotiations and disputes.
- K6 National and local factors which influence particular workplace negotiations.

CFAUR6

Prepare for workplace negotiations

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Validity	Current
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUR6
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview**This unit is appropriate for you if your role involves:**

1. Advising and supporting those who are negotiating with employers.

The activities you are likely to be involved in:

2. Supporting negotiations with local employers or making contributions to national negotiations if appropriate.
3. Identifying information from appropriate sources which will assist local negotiations.
4. Preparing background papers and cases which can be used in negotiations, including preparing financial information on the company and local market.
5. Assessing employer attitudes.
6. Identifying useful precedents to assist negotiating position.
7. Supporting representatives during negotiations to develop and adapt a strategy in relation to roles and responsibilities of the team, target objectives, bargaining range and training needs.
8. Helping members evaluate offers and their consequences.

What the unit covers:

9. Obtaining, interpreting and summarising information to support negotiations.
10. Advising on the conduct and strategy of negotiations.
11. Advising and contributing to negotiating teams.

Performance criteria

Obtain, interpret and summarise information to support negotiations

You must be able to:

- P1 Identify, consult regularly and summarise accurately relevant sources of information for supporting negotiations and circulate as appropriate.
- P2 Obtain, analyse and regularly update valid and reliable economic and financial information on relevant organisations.
- P3 Consult regularly with colleagues and representatives to provide accurate local information on comparative terms and conditions.
- P4 Where additional information is required, consult appropriate specialists and provide them with unambiguous requests.
- P5 Refer relevant information to senior officers of the union and/or colleagues for use in negotiations.

Advise on the conduct and strategy of negotiations

You must be able to:

- P6 Provide representatives with relevant and accurate information which will support the negotiation.
- P7 Summarise favourable supporting information in a manner, format and style which provides a justifiable and reasoned argument.
- P8 Provide representatives with advice to enable them to make a realistic judgement of the likely response of the employer.
- P9 Agree a negotiating strategy, based on a realistic assessment of the strengths and weaknesses of the union and employer, with the negotiating team.
- P10 Provide representatives with advice on planning processes which conform to existing procedure agreements, timetables and submission procedures.
- P11 Encourage representatives to consult with, inform and involve members in pursuance of agreed priorities.

Advise and contribute to negotiating teams

You must be able to:

- P12 Make sure tactics are agreed for the process of negotiation which are designed to maximise the chance of success within constraints and local circumstances, and that representatives are advised.
- P13 Adopt established negotiating conventions and make sure they are only broken in instances where alternative action is likely to further the claim.
- P14 Make sure that written notes on the progress, points of agreement and outcomes of the negotiations are complete and accurate.
- P15 Make sure that tactics are modified to take account of progress made, the team's assessment of the likely outcome of the negotiation, and the anticipated response of the employer and members.
- P16 Compare responses and proposals from the employers with anticipated best results, and accept and confirm in writing if they meet expectations.
- P17 Recommend and agree realistic contingency action with representatives in the event of a failure to agree with the employer.
- P18 Clearly convey the outcomes of the negotiations to members.

Knowledge and understanding

The nature and role of workplace negotiation

You need to know and understand:

- K1 The union's policy on negotiation.
- K2 Information and sources of support in relation to workplace negotiation.

Principles and concepts

You need to know and understand:

- K3 Range of negotiating and communication skills during negotiations.
- K4 Advice for representatives and members.
- K5 Interpretation of company reports and accounts.
- K6 Justifiable and reasoned arguments.
- K7 Established negotiating conventions and when they might be broken.

External factors influencing workplace negotiation

You need to know and understand:

- K8 Relevant employment law and codes of practice which apply to union workplace organisation and negotiation.

CFAUR7

Advise on and support workplace negotiations

Developed by	Skills CFA
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUR7
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview

This unit is appropriate for you if your role involves:

1. Negotiating agreements with employers.

The activities you are likely to be involved in:

2. Creating a negotiating team and developing an appropriate strategy.
3. Developing negotiating tactics and techniques.
4. Monitoring the progress during negotiations and adapting strategy.
5. Evaluating offers and making recommendations to members.
6. Consulting with members on offers and their implications.

What the unit covers:

7. Contributing to workplace negotiations.
8. Advising on the acceptance of workplace offers and agreements.
9. Advising on, and referring cases to, conciliation and arbitration services.

**Performance
criteria****Contribute to workplace negotiations***You must be able to:*

- P1 Agree a negotiating strategy which is based on a realistic assessment of the power and influence base of the membership.
- P2 Adopt established negotiating conventions and only break them where alternative action is likely to further the claim and is agreed in advance with the team.
- P3 Provide complete and accurate submissions which present a clear rationale to the employer, within agreed timescales.
- P4 Present claims which are matched to favourable comparative data and based on agreed demands and expectations.
- P5 Make sure that written responses and proposals from employers are compared with anticipated best results and accepted if expectations are met.
- P6 Make sure that written responses to proposals from employers are drafted in a language and style which clearly indicates refusals but is designed to maintain respect and trust.
- P7 Clarify negative employer responses and counter with relevant additional information and arguments.
- P8 Make sure that appropriate questions are asked to test the consistency and resilience of the employer's position and to probe for possible movement.
- P9 Where the team judge that no additional offers are available, and the agreement is not within the acceptable parameters, recommend additional action to representatives which is within the terms of the procedure agreement and union policy.
- P10 Summarise accurately the results of the negotiation and pass on promptly to all relevant parties.

Advise on the acceptance of workplace offers and agreements*You must be able to:*

- P11 Select criteria which enable realistic evaluations to be made of offers which optimise the value of the total package against the implications of

continued negotiations and the consequences of failure to agree.

- P12 Check the offers against relevant legislation, local procedure agreements and relevant aspects of union policy, and identify and summarise any variances.
- P13 Prioritise elements of the offer in line with members' expressed preferences and union policy.
- P14 Recommend for acceptance those offers which are judged to be the best available.
- P15 Where offers are not sufficient to meet expectations, explore realistic alternative strategies and actions, and identify clearly the advantages and disadvantages of each.
- P16 Consult members on the acceptability of offers, draft agreements and alternative strategies and actions.
- P17 Recommend for acceptance those proposals from employers which have the support of members and conform to union policy.
- P18 Recommend alternative strategies and actions when offers and proposals are unacceptable.

Advise on, and refer cases to, conciliation, arbitration and mediation services

You must be able to:

- P19 Explore the opportunities to resolve disputes through mediation when negotiations with employers have broken down.
- P20 Provide mediators with complete and accurate information to the dispute.
- P21 Prepare clear and concise formal case statements and present them to mediators.
- P22 Take opportunities to obtain relevant information from employers during the mediation process.
- P23 Make a realistic assessment of conciliated offers against the likely outcome of continuing the dispute and any potential rulings from adjudicating bodies.

Knowledge and understanding*You need to know and understand:***The nature and role of workplace negotiations**

- K1 Suitable strategies for your workplace.
- K2 Union policies and practices in relation to workplace negotiations.
- K3 Appropriate methods of monitoring the views of members.

Principles and concepts*You need to know and understand:*

- K4 Realistic and acceptable best results, opening offers, team roles and responsibilities, and appropriate practices and tactics for negotiation.
- K5 Team assessment of the likely outcome of the process, and the response of the employer and members.
- K6 Appropriate questions which test the employer's position and to probe for possible movement.
- K7 The use of adjournments at appropriate points in the negotiation.
- K8 Information which might be useful for national negotiations and how to present this appropriate comparative information relevant to the negotiations.
- K9 Circumstances under which normal procedures and conventions might be broken.
- K10 Appropriate criteria to evaluate offers.
- K11 The kinds of proposals which might set precedents.
- K12 Union procedures for ratification of agreements.
- K13 The circumstances in which to recommend arbitration and conciliation and when to break negotiating conventions.
- K14 ACAS procedures and systems.

External factors influencing workplace negotiations*You need to know and understand:*

- K15 Codes of practice, agreements, procedures and legal requirements which affect workplace negotiations and disputes.
- K16 Legal requirements and procedures for conducting ballots.

Developed by	Skills CFA
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUR8
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview

This unit is appropriate for you if your role involves:

1. Preparing cases on behalf of members.
2. Presenting members' cases to employers' representatives.

The activities you are likely to be involved in:

3. Gathering and evaluating information on the case.
4. Taking specialist advice on cases.
5. Conducting interviews with appellants and recording information.
6. Preparing accurate and complete case materials.
7. Preparing written submissions.
8. Preparing and delivering the presentation of the members' cases.
9. Reaching agreements and acceptable compromises.
10. Reviewing and evaluating cases.

What the unit covers:

11. Advising on the validity and credibility of cases.
12. Preparing cases for presentation and representation.
13. Presenting cases to employers' representatives.

Performance criteria

Advise on the validity and credibility of cases

You must be able to:

- P1 Collect relevant information in sufficient detail for an accurate evaluation to be made.
- P2 Consult appropriate specialists in instances where the case requires expert interpretation and judgements, and provide them with clear, valid and accurate information.
- P3 Analyse valid and reliable case information against appropriate criteria and evaluate it for likely success.
- P4 Communicate the evaluation of the likely outcome to interested parties, accompanied by a clear rationale.
- P5 Where the case is not considered to be valid or credible, provide interested parties with clear and justifiable reasons for the union's decision not to support the case and offer realistic and sympathetic advice on alternative approaches to resolving the issue.
- P6 Make sure that relevant information about the case which has a likely bearing on future cases is recorded accurately, stored securely and passed promptly to interested parties.
- P7 Make sure that confidential information obtained during the case is disclosed only to appropriate parties and with the permission of the member.

Prepare cases for presentation and representation

You must be able to:

- P8 Investigate information relevant to the case and agree it with the appellant.
- P9 Accurately summarise sources of valid and reliable information which support the case.
- P10 Conduct interviews with appellants in a way which maximises honest and accurate responses.
- P11 Advise members on procedures, appropriate responses and roles in hearings, interviews and legal proceedings.

Prepare and present cases on behalf of union members

- P12 Make sure that documentary evidence is assessed for relevance, confirmed for accuracy and summarised accurately.
- P13 Examine existing cases and precedent and incorporate relevant examples into background material and evaluation criteria.
- P14 Consult appropriate sources of advice and provide them with relevant and accurate summary information.
- P15 Evaluate case information against appropriate criteria and communicate promptly a clear and justifiable decision on whether to support the case to those who have an interest.
- P16 Make sure that case materials are complete and contain valid, reliable and accurate information.
- P17 Make sure that agreed procedures are followed and that timescales for the submission of written materials and responses are met.
- P18 Make sure that written submissions are accurate, contain valid and reliable information and follow reasoned arguments which present the case in the most favourable manner.

Present the case to employers' representatives

You must be able to:

- P19 Make sure that oral submissions are complete and accurate and conducted in a pace, style and manner intended to maintain the trust and respect of all significant parties.
- P20 Make sure that appropriate questions are prepared and asked which are designed to present and interpret evidence in the best interests of the case.
- P21 Make sure that points of agreement are noted, summarised accurately and confirmed with participants.
- P22 Make sure that points of disagreement and different interpretations are noted and clarified.
- P23 Offer additional accurate information which is designed to influence parties to change opinions and positions.
- P24 Where difficulties are encountered during the presentation process, suggest adjournments and clarify and agree information and tactics with participants.
- P25 Where agreements or an acceptable compromise are not achieved,

CFAUR9

Prepare and present cases on behalf of union members

recommend appropriate action to representatives and members which will further the case and is within agreed policy, procedures and guidelines.

- P26 Review and assess cases with representatives following presentations to identify and record key learning points.

Knowledge and understanding

The nature and role of case presentation

You need to know and understand:

- K1 The kinds of cases likely to arise in your workplace, and procedures for dealing with them.
- K2 Criteria for accepting cases and how to decide on acceptance
- K3 Advice you are likely to have to give to members and ways of presenting this advice.
- K4 Appropriate information relating to the case.
- K5 Union policies and practices in relation to member representation.

Principles and concepts

You need to know and understand:

- K6 The kinds of cases which may need specialist advice.
- K7 Relevant specialists are and how to consult them.
- K8 Criteria for accepting cases and how to decide on acceptance.
- K9 Union protocols for accepting cases.
- K10 Interview methods which will elicit honest and factual information.
- K11 Essential elements of a presentation plan and how to prepare it.
- K12 Reasoned and favourable arguments.
- K13 Local procedures for submitting documents.

External factors influencing the presentation of cases

You need to know and understand:

- K14 Codes of practice, agreements, procedures and legal requirements which affect representation of members.
- K15 Security arrangements available for storing confidential information.

CFAUR9

Prepare and present cases on behalf of union members

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Originating organisation	TUC
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Original URN	CFAUR9
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview

This unit is appropriate for you if your role involves:

1. Providing specialist advocacy for members.
2. Representing members individually and collectively with employers and adjudicating bodies.

The activities you are likely to be involved in:

3. Researching previous cases and identifying precedents.
4. Taking advice from regulatory and advisory bodies.
5. Representing members at disciplinary and grievance proceedings.
6. Preparing and presenting arbitration cases.

What the unit covers:

7. Preparing cases for presentation and representation.
8. Presenting cases to employers.
9. Presenting cases to legally constituted adjudicating bodies.

Performance criteria

You must be able to:

Prepare cases for presentation and representation

- P1 Investigate information relevant to the case and accurately summarise sources of valid and reliable information which support the case.
- P2 Conduct interviews with appellants and witnesses using a questioning style which maximises honest and accurate responses.
- P3 Advise members on procedures, appropriate responses and roles in hearings, interviews and legal proceedings.
- P4 Develop a presentation strategy which maximises the likelihood of success and explain it clearly to appellants, witnesses and representatives.
- P5 Assess documentary evidence for relevance and validity.
- P6 Evaluate cases for precedent and use relevant examples to support the appellant's case.
- P7 Consult appropriate sources of additional information and advice to establish the validity of cases, providing relevant and accurate summary information.
- P8 Evaluate case information against appropriate criteria and communicate a clear and justifiable decision on whether or not to support the case promptly to those who have a legal interest.
- P9 Make sure that case materials are complete and contain valid, reliable and accurate information.
- P10 Follow agreed procedures and timescales for the submission of written materials and responses.

Present cases to employers

You must be able to:

- P11 Make complete and accurate oral submissions in a pace, style and manner which is intended to maintain the trust and respect of all parties.
- P12 Prepare and ask appropriate questions designed to present and interpret evidence in the best interests of the case.
- P13 Note points of agreement, summarise them accurately and confirm them with participants.

- P14 Note and clarify points of disagreement and different interpretation, and offer accurate information and arguments designed to influence the parties to change opinions and positions.
- P15 Recommend further action to representatives and members within agreed procedures where no acceptable resolution has been achieved.
- P16 Review and assess cases with representatives following a presentation and identify key learning points.

Present cases to legally constituted adjudicating bodies

You must be able to:

- P17 Follow established conventions and procedures.
- P18 Provide complete and accurate written submissions which contain valid and relevant information and which present the case in the most favourable manner.
- P19 Make complete and accurate oral submissions in a pace, style and manner which is intended to maintain the trust and respect of all parties.
- P20 Make clear and concise oral presentations which identify the relevant points of the supporting argument and which avoid additional information or opinions which have no direct bearing on the current matter.
- P21 Make appropriate interventions and ask questions designed to present and interpret evidence in the best interests of the appellant.
- P22 Make final summaries which identify the relevant points of the supporting argument and the major weaknesses in the opposing submission.
- P23 Review and assess the results following a formal case presentation with appellants and representatives, and identify key learning points.
- P24 Make clear and justifiable recommendations for further appropriate action to determine cases when submissions have been unsuccessful.

Knowledge and understanding

The nature and role of specialist advocacy services

You need to know and understand:

- K1 The rights of individuals to specialist advocacy within employment.
- K2 The appropriateness of specialist advocacy services in particular cases.
- K3 Equality of access to specialist advocacy services.

Principles and concepts

You need to know and understand:

- K4 Appropriate sources of information.
- K5 Effective case presentation face-to-face and in writing in a variety of contexts.
- K6 Questioning witnesses and appellants effectively.
- K7 Circumstances under which a case would not be supported.
- K8 Influential and reasoned arguments.
- K9 The conventions and procedures of adjudicating bodies.

External factors influencing advocacy services

You need to know and understand:

- K10 Relevant employment law and codes of practice.

CFAUR10

Provide specialist advocacy services on behalf of union members

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Originating organisation	TUC
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Original URN	CFAUR10
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	representing union members; union collective interests; collective bargaining strategy; union recognition rights; union collective agreements; resolution industrial disputes; presenting union cases; workplace negotiations; union advocacy service
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Overview

This unit is appropriate for you if your role involves:

1. Developing appropriate forms of health and safety representation at work.
2. Monitoring health and safety policies and procedures.
3. Informing and advising others on health and safety at work.
4. Promoting health and safety policies and practices among colleagues.

The activities you are likely to be involved in:

5. Contributing to appropriate safety committees and joint working parties.
6. Negotiating time off to perform representative duties.
7. Monitoring that legislation is being followed.
8. Identifying appropriate information on health and safety and presenting it to colleagues.
9. Advising on health and safety issues.
10. Carrying out investigations and inspections.

What the unit covers:

11. Helping to develop strategies for representing health and safety issues at work.
12. Obtaining information about health and safety and advising members.
13. Encouraging others to support health and safety procedures.

**Performance
criteria**

Help to develop strategies for representing health and safety issues at work

You must be able to:

- P1 Propose the setting up of appropriate forms of representation and consultation on health and safety issues.
- P2 Identify and request the resources and facilities needed to carry out your duties and responsibilities as a safety representative.
- P3 Identify appropriate individuals who could take on the role of safety representative and encourage them to stand when vacancies arise.
- P4 Identify appropriate preventative and proactive policies which will contribute to the health and safety of colleagues.
- P5 Make sure health and safety actions taken conform to relevant legislation, local agreements and your union's policy and procedures.
- P6 Take action to rectify any actions which do not conform to legislation or agreed procedures.
- P7 Conduct regular reviews of health and safety policies produced by employers and make suggestions for updating them as required.
- P8 Review developments in your industry and in others which may affect health and safety issues.
- P9 Agree a plan of action with colleagues which responds to changes in health and safety.
- P10 Monitor action plan and make modifications as required.

Obtain information about health and safety and advise members

You must be able to:

- P11 Find out what information about health and safety is available and how to obtain it.
- P12 Obtain specific information of immediate interest to the workplace.
- P13 Make effective summaries of complicated information and pass on useful information to members and your colleagues.
- P14 Explain relevant information to make sure others understand their health and safety duties and responsibilities.

- P15 Set up and maintain an up-to-date health and safety information system which meets the needs of your colleagues and members.
- P16 Make sure that all health and safety notices and documentation are up to date and correct.
- P17 Make sure that all advice on health and safety given to colleagues and members conforms to relevant legislation, local agreements and your union's policy and procedures.
- P18 Pass on requests and queries to specialist agencies as required.
- P19 Consult with members on proposals from employers which will affect health and safety.

Encourage others to support health and safety procedures

You must be able to:

- P20 Keep up to date with health and safety issues by obtaining information and consulting with colleagues.
- P21 Consult with members regularly on key policies and priorities for health and safety and how they can be implemented.
- P22 Make sure that members are fully aware of their personal responsibilities for health and safety.
- P23 Actively promote the advantages, benefits and value of existing health and safety policies to all others in the workplace.
- P24 Brief and advise those involved in negotiations about relevant health and safety issues.

Knowledge and understanding

The nature and role of the health and safety representative

You need to know and understand:

- K1 Forms of representation through safety committees and working parties.
- K2 Resources needed to perform the safety representative role in terms of time off to perform these duties, and required training.
- K3 Resources needed to perform the safety representative role in terms of space and equipment.
- K4 Promoting an active health and safety culture.

Principles and concepts

You need to know and understand:

- K5 Appropriate forms of consultation.
- K6 Local conditions which impact on health and safety issues.
- K7 Information systems.
- K8 Appropriate individuals to take on the health and safety representative role, and ways of engaging them in the process.
- K9 Actions to deal with non-conformance on health and safety issues.
- K10 Sources of information on health and safety issues.
- K11 Sources of expertise on health and safety issues.

External factors influencing health and safety representation

You need to know and understand:

- K12 Health and safety legislation affecting individuals at work.
- K13 Responsibilities of individuals for their own health and safety at work and the safety of others.
- K14 Local agreements and union policies and practices.
- K15 Current relevant developments in health and safety at work.

CFAUS1

Represent the health and safety interests of those at work

Developed by	Skills CFA
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Version number	2.0
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Validity	Current
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Status	Original
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Originating organisation	TUC
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Original URN	CFAUS1
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union health & safety committees; union health & safety representatives
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Overview

This unit is appropriate for you if your role involves:

1. Helping identify and control risks in the workplace as a union health and safety representative.
2. Monitoring and reviewing risk assessments as a union health and safety representative.

The activities you are likely to be involved in:

3. Negotiating a risk assessment programme.
4. Ensuring that the 'competent person' has the necessary skills and knowledge to perform the role.
5. Contributing to the planning and conduct of risk assessments.
6. Raising risk assessment issues at safety committee meetings.
7. Ensuring risk assessment procedures and frequency are kept under review and modified as required.

What the unit covers:

8. Contributing to the identification and control of risks.
9. Contributing to the monitoring and reviewing of risk assessments.

Performance criteria

You must be able to:

Contribute to the identification and control of risks

- P1 Assist in negotiating a framework and programme of risk assessment.
- P2 Agree the role of the safety representative in the risk assessment process.
- P3 Negotiate appropriate levels of education and training from the employer and the union to enable you to understand the risk assessment process.
- P4 Check that the people designated as the 'competent person' within the regulations have adequate skills and resources to perform their duties effectively.
- P5 Help plan the risk assessment process through meetings with members and safety committees.
- P6 Help identify the points to be included in the risk assessment process with safety committee members and others.
- P7 Help identify appropriate prevention, protection and control measures to deal with identified risks.
- P8 Check that the proposed measures have been considered and implemented as agreed.

Contribute to the monitoring and reviewing of risk assessments

You must be able to:

- P9 Check the results of inspections against existing risk assessments to make sure the assessment remains valid.
- P10 Ask for a review of existing risk assessments where they are no longer valid or where there has been a substantial change to the conditions and circumstances in the workplace.
- P11 Agree and monitor the frequency of risk assessments reviews.
- P12 Check that changes agreed as a result of risk assessments are introduced and maintained.
- P13 Make sure that members are fully informed of changes made as a result of risk assessments.
- P14 Identify and pass on to your employer information about changes in legislation, union recommendations and changes in work practices which affect the validity of existing risk assessments.

Knowledge and understanding

The nature and role of the health and safety risk assessment

You need to know and understand:

- K1 Key aspects of the risk assessment process, including trial risk assessments, consultation and feedback with members, the nature of inspection and maintenance reports, and accident and incident reports.
- K2 Union policies and procedures in relation to the control of risks in the workplace.
- K3 The period between risk assessments to maintain health and safety at work and comply with legal requirements.
- K4 Facilities needed to conduct risk assessments.
- K5 Liaison with those who can take action.
- K6 Coherent policies to progressively reduce risk.
- K7 Whole workforce measures.
- K8 An active health and safety culture.

Principles and concepts

You need to know and understand:

- K9 Skills and resources needed to perform the 'competent person' role as defined in legislation, and agree criteria for their selection.
- K10 Appropriate forms of consultation with members taking account of equality and diversity.
- K11 Appropriate measures to eliminate or avoid risk and control risks at source.
- K12 Adaptation of working practices to individual needs in relation to identified risks.
- K13 Exploitation of technical developments in relation to the control of risks.

External factors influencing risk assessment

You need to know and understand:

- K14 Legal procedures for risk assessment.
- K15 Union policies and practices in relation to risk assessment.
- K16 Current relevant developments in health and safety at work.

CFAUS2

Contribute to the control of risks as a union health and safety representative

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Originating organisation	TUC
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Original URN	CFAUS2
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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union health & safety committees; union health & safety representatives
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Overview

This unit is appropriate for you if your role involves:

1. Improving health and safety through health and safety committees.

The activities you are likely to be involved in:

2. Reviewing the results of inspections.
3. Agreeing changes to work practices.
4. Contributing to health and safety committees.

What the unit covers:

5. Contributing to health and safety committees.

**Performance
criteria**

Contribute to health and safety committees

You must be able to:

- P1 Prepare for meetings by reviewing minutes and supporting documents and decide on possible action needed.
- P2 Suggest agenda items for meetings.
- P3 Agree a joint union approach with other committee members if required.
- P4 Contribute to committee meetings in line with agreed strategy and indicate points of agreement and potential disagreement.
- P5 Suggest adjournments as necessary.
- P6 Make clear notes about discussions and actions agreed.
- P7 Review progress achieved after meetings and consider further action needed.
- P8 Distribute reports of safety committee meetings to members, and answer any queries or concerns they may have.
- P9 Check that the action agreed has been carried out and raise any failure to act at the next meeting.
- P10 Review the functioning of the committee and suggest changes as required.

Knowledge and understanding

The nature and role of the health and safety committees

You need to know and understand:

- K1 Appropriate health and safety issues and information for committees.
- K2 Appropriate sources of specialist advice.

Principles and concepts

You need to know and understand:

- K3 Roles and responsibilities of health and safety committees.
- K4 Agreed procedures and protocols of health and safety committees.

External factors influencing risk assessment

You need to know and understand:

- K5 Prescribed documents for risk assessment.
- K6 Union policies and practices in relation to health and safety committees.
- K7 Developments in health and safety at work.

CFAUS3

Contribute to workplace health and safety committees

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Relevant occupations	Trade Union Representatives and Professionals
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Suite	TUC Core Trade Union role
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Key words	union health & safety committees; union health & safety representatives
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Overview

This unit is appropriate for you if your role involves:

1. Negotiating changes in health and safety procedures in the workplace.

The activities you are likely to be involved in:

2. Reviewing the results of inspections.
3. Reporting risks.
4. Agreeing changes to work practices.
5. Developing a negotiating strategy and plan.
6. Producing documents to support a case.
7. Reviewing decisions made by health and safety committees.

What the unit covers:

8. Presenting cases to employers' representatives.
9. Assisting in negotiations in the workplace.

Present health and safety cases to employers and assist in negotiations in the workplace

Performance criteria

Present cases to employers' representatives

You must be able to:

- P1 Present a clear case for changes in working practices or action following health and safety reports.
- P2 Select and present relevant information which supports the recommendations.
- P3 Present the information in a manner which avoids unnecessary antagonism, and which encourages trust and mutual respect.
- P4 Prepare the evidence in advance in a way that favours your position.
- P5 Note what has been agreed and check with everyone that you have an accurate record.
- P6 Note and check the nature of any disagreements and differences of interpretation of the evidence.
- P7 Put together arguments which are likely to persuade the employers' side to change position.
- P8 Ask for adjournments as necessary to reconsider and agree the team's approach to future negotiation.
- P9 Decide what action to take in the event that you do not obtain an acceptable result which is within the legislation and follows union policies and procedures.
- P10 Review and assess the negotiation process to identify what can be learned for future negotiations.

Assist in negotiations in the workplace

You must be able to:

- P11 Agree a negotiating strategy with the team which is suitable to the type and subject of the negotiation.
- P12 Prepare a written submission of your position supported by appropriate information and statistics.
- P13 Accept employer responses which meet your team's agreed acceptable best result.
- P14 Reject unacceptable responses in a manner which allows continued

Present health and safety cases to employers and assist in negotiations in the workplace

discussions and negotiations.

- P15 Check that you understand the reasons for the negative employer response and test the employers' position and resilience of argument and potential for movement.
- P16 Follow the normal procedures and conventions for negotiation.
- P17 Summarise and record all points of agreement.
- P18 Suggest temporary adjournments where appropriate to obtain additional information, advice and support.
- P19 Modify strategy to take account of agreements already made and an assessment of what it is possible to achieve and acceptable to members.
- P20 Where no further agreement is possible, conclude negotiations and consider what alternative action would be appropriate.

CFAUS4

Present health and safety cases to employers and assist in negotiations in the workplace

Knowledge and understanding

The nature and role of the health and safety negotiations

You need to know and understand:

- K1 Appropriate health and safety issues and cases for presentation to employers.
- K2 Appropriate information relevant to health and safety negotiations.
- K3 Union policies and practices in relation to workplace negotiations regarding health and safety issues.
- K4 Appropriate sources of specialist advice.

Principles and concepts

You need to know and understand:

- K5 Realistic and acceptable results, opening offers, team roles and responsibilities and appropriate tactics for negotiations.
- K6 Appropriate questions to test the employers' position and to probe for possible movement.
- K7 Appropriate comparative information relevant to the negotiations.
- K8 Appropriate criteria to evaluate offers.

External factors influencing health and safety negotiations

You need to know and understand:

- K9 Legal documents and forms for health and safety.
- K10 Union policies and practices in relation to health and safety.
- K11 Current relevant developments in health and safety at work.

CFAUS4

Present health and safety cases to employers and assist in negotiations in the workplace

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Relevant occupations Trade Union Representatives and Professionals

Suite TUC Core Trade Union role

Key words union health & safety committees; union health & safety representatives
