Branch Governance Handbook

June 2019

THE ROYAL COLLEGE OF MIDWIVES

Promoting · Supporting · Influencing

www.rcm.org.uk

RCM BRANCH

Contents

Foreword

Welcome to the second edition of the branch Governance Handbook for the Royal College of Midwives (RCM).

The role of local branches is vital to the ongoing success of the RCM. Branches engage with and support our members locally, influence action through their activities, contribute to national policy development and support delivery of our national strategic objectives.

As a branch officer, workplace representative, MSW advocate or an active branch member you are part of a network that is supported by regional/National officers and organisers as well as RCM staff in headquarters and the country offices.

This handbook will be a live document, which will continue to develop over time. If you have any comments or would like to suggest additional areas that you feel should be covered within it, please contact the branch Governance Committee who will be able to take this forward.

Finally, I would like to take this opportunity to thank you for all your hard work in contributing to the success of the RCM. I hope that you find this handbook a helpful tool in supporting your role, the branch and its members.

G Walton

Gill Walton
RCM Chief Executive

Introduction

This handbook has been produced by the Royal College of Midwives (RCM). It is intended as a user-friendly guide to support branch officers, workplace representatives and maternity support worker (MSW) advocates with the smooth running of their local branch in England, Scotland, Wales and Northern Ireland.

It outlines the rules and governance procedures, which all branches are expected to follow to ensure that the interests of local members are protected and RCM policy and protocols are adhered to. There is detailed guidance on the role of the branch chairperson, secretary, treasurer, workplace representatives and MSW advocates along with an overview of the information and support available to local branches.

This handbook is not intended to be an exhaustive guide and as an RCM branch officer, workplace representative and MSW advocate you can access a range of training and support that complements the information contained within this guide.

A number of references provide links to further information and if in doubt, you should always take advice from your regional (England, Northern Ireland) or national (Scotland and Wales) officer, or organiser. All queries concerning the branch Governance Handbook can be sent to Branch.Governance@rcm.org.uk.

Note on annual branch reviews

The RCM has introduced requirement for branches to complete a short branch annual review which is to be completed at the branch AGM and returned with the annual statement of receipts and payments and updated branch information form before the end of January every year.

This measure will improve the correlation between planned branch activity, growth strategies and the support made available by the RCM Governance Committee, regional/national officers and organisers.

The annual branch review can be downloaded from the RCM website www.rcm.org.uk/reps-and-branches/branches and submitted either via post or email to activists@rcm.org.uk.

Additional branch resources, information and poster/newsletter templates are available via this link www.bit.ly/RCMBranches.

Governance arrangements

The RCM is the only trade union and professional organisation that is solely dedicated to the promotion, representation and support of midwives, maternity support workers (MSWs), student midwives and the midwifery profession in the UK. The vast majority of the midwifery profession are our members.

The RCM promotes midwifery, quality maternity services and professional standards. We support and represent our members individually and collectively in all four UK countries. We influence on behalf of our members and for the interests of the women and families for who they care.

RCM board

The RCM is governed by an elected board, which is responsible for setting the broad strategic direction of the organisation, ensuring it is viable, properly managed and governed. All board members have to be RCM members and registered midwives. Further information on the RCM Board can be found at the RCM website.

RCM headquarters and UK country offices

The RCM is governed by an elected board, which is responsible for setting the broad strategic direction of the organisation, ensuring it is viable, properly managed and governed. All board members have to be RCM members and registered midwives. Further information on the RCM Board can be found at the RCM website.

RCM Branch Governance Committee

The RCM Branch Governance Committee ensures on behalf of the chief executive that there are clear lines of accountability between branches and the RCM. branches are accountable to the committee through the submission of an annual financial return and the production of an annual branch review.

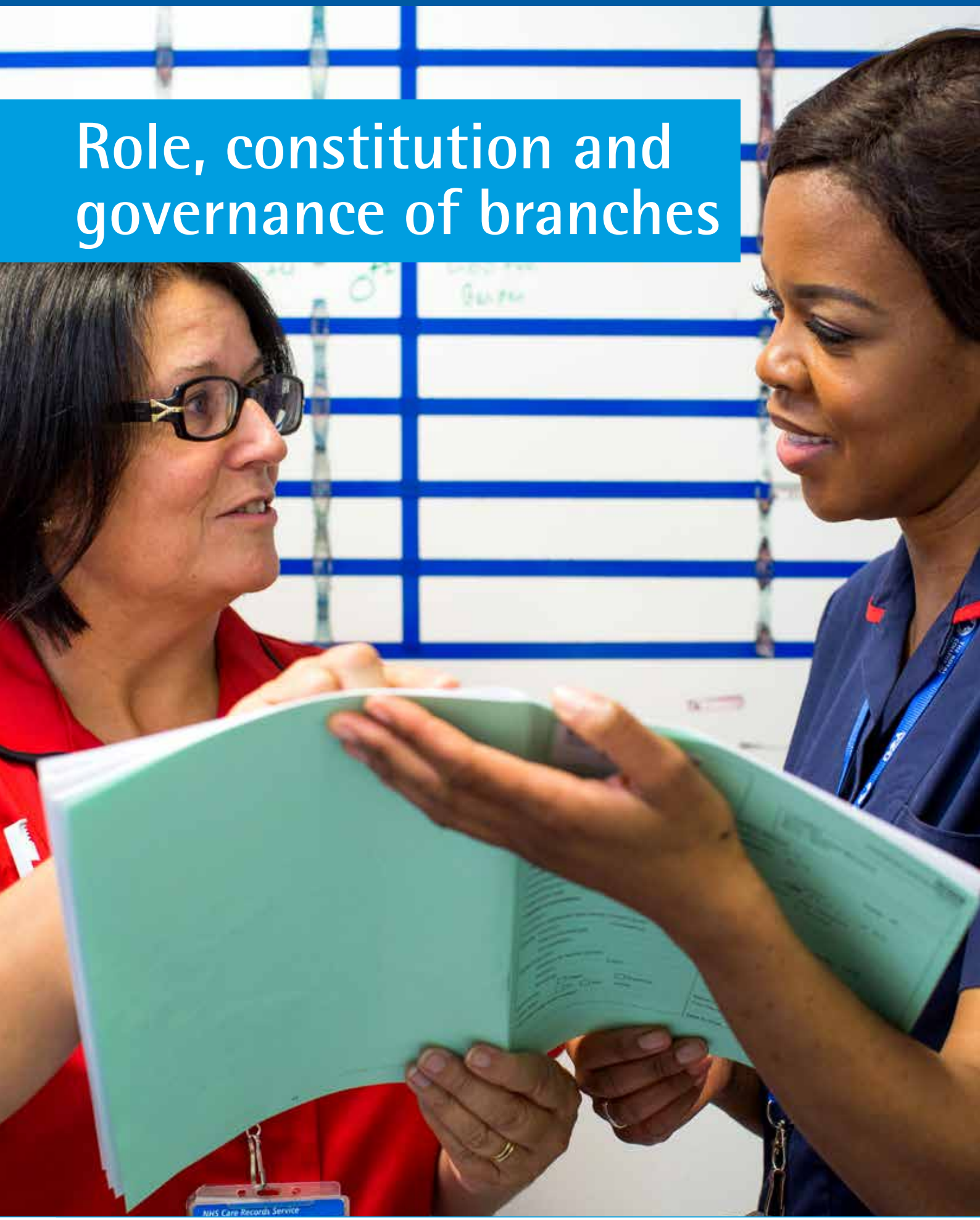
The Branch Governance Committee produces an annual branch review report that summarises branch activity and highlights case studies. This will be submitted to the chief executive and made available on the RCM website.

The Branch Governance Committee also:

- agrees the configuration and geographical boundaries of the branches with the aim of branches being co-terminous with employers
- approves requests for the opening, merger, splitting or closing of branches
- reviews branch financial activity to ensure that the RCM's financial policies and processes are being adhered to
- monitors and develops the work and efficiency of branches, ensuring that they are compliant with the RCM's branch constitution and use the RCM's strategic goals to generate branch activity
- identifies areas where branches require further support and guidance from the RCM and oversees the development of training and other resources for branch officers
- receives and consider appeals concerning the removal of accredited workplace representative or branch officer positions.
- receives complaints regarding branch election processes and financial irregularities and investigating accordingly
- monitors the effectiveness of the governance arrangements in place and modifies these as required

The Branch Governance Committee can be contacted care of the RCM Headquarters (see Appendix 4) or by e-mail Branch.Governance@rcm.org.uk.

Role, constitution and governance of branches



This section covers the role, constitution and governance of branches. For guidance on the opening of a new branch, reopening of a closed branch, or closing of a branch please see the next chapter.

The Role of RCM branches

There are over 200 RCM branches across all four countries in the UK, which undertake activities such as addressing workplace issues, hosting branch learning events, supporting members to attend the RCM conference, celebrating midwifery locally and reimbursing expenses incurred by workplace representatives while supporting members.

The role of an RCM branch is to promote and advance excellence in midwifery practice and policy by enabling members to meet together locally for trade union, professional, educational and social purposes. The branch should encourage, facilitate and support the building of a strong workplace organisation through the recruitment, retention and development of members, workplace representatives, and MSW advocates to support the RCM in the delivery of its strategic objectives.

An effectively run branch combines several factors, which include:

- effective, active and autonomous branch officers, workplace representatives and MSW advocates
- considerable levels of participation from branch members in RCM activities
- sufficient online and noticeboard profile to achieve awareness among all members (and potential members) of local RCM issues and priorities
- effective communication from the branch to members
- timely, appropriately advertised and engaging branch meetings which are held for decisions to be made and mutual consultation and learning to take place
- effective and accountable use of its funds for the benefit of its membership
- a strategy for building the membership base of the branch, including reaching out to MSWs to join
- engagement with what the RCM is doing nationally
- plan and co-ordinate workplace campaigns

Branches should meet regularly to give and receive support, discuss professional and workplace issues and hold an AGM to elect workplace representatives, branch officers and MSW advocates.

RCM branches also organise fundraising events (see Appendix 8) to supplement branch funds, invite guest speakers to attend meetings, hold study days, branch conferences and social events. The branch may also develop a working relationship with local university midwifery societies (see page 19).

Use of social media and video conferencing technology

There is a growing demand for a social media presence and virtual branch meetings to promote RCM branches and their activity particularly on Facebook. Branch proceedings can be enhanced by technology such as videoconferencing and webinars which can connect members to the meeting from other sites. Appendices 5 and 6 provide further guidelines on virtual branch meetings and Facebook groups. However, they cannot replace the functions of the branch as provided for in the constitution, and physical meetings are necessary and required where possible.

Branch constitution

The RCM has produced a model branch constitution (Appendix 1) outlining the principles by which branches should be governed, which all branches should use as a template to produce their own version. The branch constitution should be regularly reviewed (at least every three years) to ensure that it remains current. All branches must ensure that they are compliant with the branch constitution, particularly the holding of an AGM, the election and accreditation processes for workplace representatives, the production of the annual statement of receipts and payments, and the annual branch review.

The role of the branch committee

The activities of the branch are organised on behalf of its members by a committee, which works to keep the branch active, visible and engaged with members, and ultimately ensures that it runs smoothly and effectively. It is the branch committee's responsibility to ensure on behalf of members that the branch meets the purposes and responsibilities as defined in the branch constitution and operates in accordance with RCM policy and protocols. The committee is accountable for the organisation of the branch both to branch members at the AGM and to RCM headquarters through the submission of its annual statement of receipts and payments, and the annual branch review.

Having an effective branch committee is important. It allows workload to be shared, encourages involvement in branch activity by RCM members, brings together a range of skills and experience, and allows for sharing of ideas. The branch committee should comprise at least the chairperson, secretary and treasurer, but it is good practice for other committee members to be elected to support the running of the branch, such as a steward, health and safety representative, learning representative and an MSW advocate. Other branch members should be encouraged to take part in the branch committee to help manage the workload and broaden their experience of branch management. An overview of the role of each of the branch officers can be found in Appendix 2.

Annual general meeting (AGM)

Each branch must hold an AGM for all members each year. This should be held where possible in January to enable the election of branch officers, workplace representatives and MSW advocates for the year ahead and to sign off the annual statement of receipts and payments, and the annual branch review before they are submitted to RCM headquarters.

For further information on the annual financial return, annual branch review, branch officer and workplace representative elections, refer to the appropriate sections in the Handbook.

Members should be informed of the date of the AGM no later than 14 days before the meeting is due to take place. Notice of meetings should as a minimum be posted on appropriate notice boards within each branch workplace. Promotion by e-mail and on social media is also a good way to inform members.

In order that binding decisions can be made, a quorum of not less than five members of the branch membership should be the norm.

Decisions relating to matters under discussion will normally require a motion, and a decision can be reached by a show of hands. However, where it is considered appropriate that confidentiality should be preserved, a secret ballot should be arranged. If equal votes are received for and against a motion, the chairperson may exercise a second or casting vote to enable a decision to be made.

Branch finances

It is mandatory for branches to hold funds in their own Unity bank account. The block grant (see below) can only be paid into a Unity account. To open a Unity account there is a form to fill in. The form can be found and downloaded from our website: www.rcm.org.uk/reps-and-branches/branches. It is advisable that there are two signatories for any payments drawn from the bank account for which the bank has specimen signatures.

Note: after November 2018, all changes to branch accounts will need to be submitted online via the Unity website, www.unity.co.uk/update-your-details/ where you can:

- change signatories
- set up or change your Internet banking access
- amend the details on your bank account

You will be able to access the online tutorial to guide you through the process step by step. There is also a FAQ section to help you with any additional queries you may have. If you have any questions, please email us@unity.co.uk or call Unity trust on 0345 140 1000.

A block grant will be paid by RCM headquarters once a year upon submission of the annual statement of receipts and payments. The statement of receipts and payments (also known as the annual financial return) should be produced for approval at the AGM of the branch. The annual financial returns submitted by branches are included in the overall RCM accounts preparation.

Branches are not required to have their statements audited separately by an external person.

The block grant equates to £200 per year plus £1 for each member. Where a branch covers more than one significant workplace an additional payment of £200 to the branch per significant workplace will be paid. For advice on the definition of a significant workplace, confer with your regional/national officer or organiser.

As the voice of midwifery, the branches are an extended arm of the RCM, providing a local focus for professional and trade union activities. The block grant is there to support these activities and should be available and used for those purposes only. Branches should be spending their block grant on:

1. expenses incurred by workplace representatives, branch officers and MSW advocates
2. promotion of activities that furthers the role of the branch – for ideas view the latest branch activities at www.rcm.org.uk/reps-and-branches/branches
3. assisting members in pursuing their trade union, professional, educational and social interests such as attending annual conference (where funds allow)

Branches can also undertake separate fundraising activities for the purposes of supporting charities that are consistent with the aims and objectives of the RCM, and to assist members in pursuing their trade union, professional, educational and social interests, such as attending the annual conference or for a collective learning fund. All funds raised for a particular cause must be used for that particular cause and it may therefore be necessary to open up a new account for that purpose. Branch treasurers have responsibility for ensuring that all branch fundraising is properly accounted for. Branches should not undertake fundraising to support travel expenses for workplace representatives or for members to attend branch AGMs or in the pursuit of industrial action. Further guidance on branch fundraising can be found in Appendix 8.

The annual accounting period and funding cycle for RCM branches is from 1 January to 31 December. The annual statement of receipts and payments should be prepared on the form which is provided annually. A copy of the statement should be forwarded to the head of finance at RCM headquarters no later than 31 January each year. The future funding a branch receives from RCM headquarters will depend upon the timely submission of their annual financial return. Those branches that do not submit an annual return will not receive an annual block grant.

If a branch is not active, going through a period of change or does not have branch officers, the branch should return its funds to RCM Finance for safekeeping. RCM Finance can look after the branch funds for up to five years until the branch starts functioning again. If a branch is inactive for more than five years, the accumulated funds will be returned to the RCM main budget.

The bank should be immediately informed of any changes to signatory for the account. This is important for maintaining the confidence of the members and the integrity of the RCM.

If a branch fails to submit an annual statement of receipts and statements for two consecutive years, the RCM will close its Unity bank account to ensure that no charges are incurred. Notice will be given to the branch treasurer or, in the absence of a branch treasurer, another branch officer. The regional/national officer and organiser will also be informed.

All concerns regarding management of branch funds that cannot be resolved within the branch can be referred for further investigation to the Branch Governance Committee at Branch.Governance@rcm.org.uk.

Annual branch review

The RCM has recently introduced the requirement for branches to complete a short annual branch review. This can be downloaded from the RCM website – www.rcm.org.uk/reps-and-branches/branches and submitted either via post or email to activists@rcm.org.uk.

The information that branches provide will enable the RCM to monitor branch activity and plan future support.

The annual branch review is both a review of the activities of the previous year and the planning of future branch activities. The review should help the branch to identify areas of success and challenge during the year and map local and national priorities in the year ahead. This process

will also aid branch financial management and help identify resources and other forms of support required from RCM officers or organisers.

It is the responsibility of the branch secretary to produce the annual branch review in conjunction with the branch committee members. The review should be produced and presented for agreement at the branch AGM alongside the statement of receipts and payments. Once agreed it should be submitted to activists@rcm.org.uk alongside the AGM forms (annual finance returns and branch information form). The deadline for submitting the annual branch review will be 31 January each year. For further advice and guidance on completing your annual branch review contact your regional/national officer or organiser.

Branch meetings

The branch committee will arrange an annual programme of meetings and events to meet the needs of local members.

The branch secretary should inform all members at least seven days before a regular branch meeting is due to take place. Notice of meetings should appear on the union noticeboard if one is available and by the use of e-mail, text and social media. The method of communication should be agreed by the branch committee. Notices should state the date, time and place of the meeting and outline the business to be discussed in the form of an agenda. Branches may wish to have regular agenda items for reports from branch officers, workplace representatives and MSW advocates.

In order that binding decisions can be made on behalf of all members entitled to attend, a quorum of not less than five members of the branch should be the norm. If equal votes are received for and against a motion, the chairperson will exercise a second or casting vote to enable a decision to be made.

Meeting notes should be taken of the meeting, summarising key discussion points and decisions made. They should be available for members (not just those attending). You should be mindful that some discussion, including casework information, should not be noted or distributed.

Branch meetings provide an excellent opportunity for committee members to:

- raise workplace issues which impact on members and discuss at branch level how these can be addressed
- plan and co-ordinate workplace campaigns
- discuss current negotiations with management that affect RCM members and ensure the stewards involved in the negotiations are aware of the membership's views
- organise recruitment and engagement activity
- identify potential new branch officers, workplace representatives and MSW advocates
- elect branch officers, workplace representatives or MSW advocates if a vacancy becomes available after the AGM (Note; they will be elected for one year or up to the next Branch AGM meeting if this is sooner)
- educate members about issues in the workplace through a variety of methods, such as branch circulations, study days and branch conferences
- write and distribute correspondence to keep members informed – for example, newsletters, emails, Facebook branch pages
- share correspondence from RCM offices and headquarters with members

Industrial action

The RCM rules state that only the RCM Board (or the chief executive of the RCM, if the RCM Board has delegated the authority) has the authority to call a ballot for industrial action or to call members to take industrial action. In the event of the RCM calling a ballot for industrial action, RCM branches will be provided with separate guidance and actions to ensure that the ballot and industrial action complies with the law.

If branches are in dispute with their trust/health board/ employer and are considering taking action, a regional/ national officer should be in attendance to advise.

Formation of branches

This section covers the:

- opening of a new branch, a merger of branches or a splitting of a branch
- closing of a branch
- reopening of a previously closed branch
- affiliation of two or more branches where they cover one employer
- affiliation of a branch to a university midwifery society
- disputes on the formation of branches

It is not possible to identify all possible scenarios and members should seek the support of the regional/national officer or organisers where needed. For all forms relating to these procedures, refer to the RCM website.

For advice on the role, constitution and governance of branches see the previous chapter.

It is the aim of the RCM that by 2020 all branches are employer-based, meaning that each member will be part of the branch covering the NHS Health Board (Wales, Scotland), Trust (England, Northern Ireland[1]) or organisation that they are employed by.

Forming an employer-based branch may therefore require the merger, splitting, closing or affiliation of existing branches. Employer-based branches need not prohibit individual units within a multi-site employer continuing to organise events.

Note on employer based branches

It is important that branches are employer-based as it ensures that members are supported by workplace representatives who are employed by the same employer and are familiar with the policies and procedures of that organisation. An employer-based branch also makes RCM membership stronger and more unified in the local area, with common goals and a united voice against any local and employer specific issues that our members may face.

For further advice on how to move your branch to an employer-based model, contact your RCM national (Scotland and Wales)/regional (England and Northern Ireland) officer or organiser.

1 Referred to in Northern Ireland as Health and Social Care (HSC) Trusts

Process for the opening of a new branch

To establish a completely new branch, a petition of signatures from as many members as possible should be obtained and attached to a letter to the RCM Branch Governance Committee seeking approval to do this (a template request is available on RCM website). In some circumstances, a regional/national officer or organiser may help organise the process of forming a new branch.

If an employer-based branch is in the process of being established and as a result some members would be leaving or dissolving another branch, this should be recorded by their current branch secretary and the regional/national officer or organiser. This may be facilitated by an appointed member (a branch officer or workplace representative wherever possible), determined by a meeting of those affected.

Once Branch Governance Committee approval has been granted, the new branch can hold its first AGM to elect its branch officers, workplace representatives and MSW advocates. The treasurer will be required to open a Unity bank account so that the branch can receive their funds from RCM Finance at headquarters.

Process for the merger of branches

To merge a branch, a form (available on the RCM website) needs to be completed and submitted to the RCM Branch Governance Committee at headquarters for approval.

Full consultation should be undertaken with all members before a branch merges with another. The merger of branches should be guided by the regional/national officer or organiser in order to maintain consistency of process. In circumstances where branches do not have the capacity to implement the merger process, the regional/national officer or organiser may help organise the process of merging branches.

If there are a number of branches within an employer but only one is active, members may transfer from the inactive branch(es) to the active one, which can then be renamed. The branch funds of the inactive branch(es) can be transferred to the active branch.

Once Branch Governance Committee approval has been granted, the new branch can hold its first AGM to elect its branch officers, workplace representatives and MSW advocates. The treasurer may be required to open a Unity bank account so that the branch can receive their funds from RCM Finance at headquarters.

Process for the splitting of a branch into two or more branches

Where a branch covers more than one employer, the RCM will require it to be split into two or more branches each co-terminous with an employer. To split a branch, a form (available on the RCM website) needs to be

completed and submitted to the RCM Branch Governance Committee at headquarters for approval. Once approved, full consultation should be undertaken with members of the branch to be split. The splitting of a branch should be guided by the regional/national officer or organiser in order to maintain consistency of process. In circumstances where branches do not have the capacity to implement the splitting process, the regional/national officer or organiser will help to organise and manage the process.

The members of the branch to be split will agree how the branch fund should be split. This would usually be pro-rata across the new branches.

One branch can retain the existing pro-rata branch fund which will be renamed. The new branch(es) will be required to open a new account. The funding of the new branch(es) can then be transferred. Both branches will be required to hold an AGM to elect its branch officers, workplace representatives and MSW advocates.

Process for the closing of a branch

The decision to dissolve a branch should only be taken following consultation with the membership and the regional/national officer or organiser and take place at an extraordinary general meeting of the branch. The regional/national officer or organiser may refer to the Branch Governance Committee for guidance. Branches may consider closing for reasons of inactivity in response to an employer merger or reformation.

Notice of such a meeting should be circulated to all members of the branch at least three weeks prior to the date of the extraordinary general meeting, together with details of the exact nature of the business to be discussed, including the transfer of members to other RCM branches and the transfer of branch funds as appropriate.

A branch may be dissolved if a resolution is passed by a majority of members present at a branch meeting. A formal motion must be put before the members to decide the distribution of branch funds, which must be one of the following options:

- if the branch members are to join with another branch the funds may be transferred to that branch
- if the members of the dissolved branch are transferring their membership to more than one branch, the RCM Branch Governance Committee at headquarters may decide to divide the available funds from the dissolving branch between the branches to which members are being transferred. The transfer of funds will be per capita
- the funds may be transferred to RCM Finance, where they will be held for a period of five years. If the branch re-opens within that time, the funds will be returned to the branch

If the branch decides to dissolve you will need to discuss with your regional/national officer or organiser. A form will need to be completed and submitted to the RCM Branch Governance Committee at headquarters. The RCM Branch Governance Committee will then confirm the closure of the branch. Dissolving branches should contact their bank to instruct them to transfer their funds to the RCM General Fund held by Unity bank. Once approval has been granted, all of the branch records including the accounts must be returned to RCM headquarters. A final account of the statement of receipts and payments must also be sent to RCM headquarters, as well as the minute book, treasurer's accounts and all other records of the branch.

Process for the re-opening of a branch

Where a branch has closed or is inactive and branch funds have been transferred to the RCM, the monies will be held for five years. If during this time the branch re-opens or becomes active again, the fund can be returned. At the end of the five-year period, the RCM will contact members

of the branch to give them notice that the fund will no longer be available for return. This will not prevent a future re-opening of the branch but the branch will not be able to claim the funds returned.

Return of the fund will be dependent on the branch setting up a Unity bank account.

Disputing the formation of a branch

If members wish to dispute the formation of a new branch and/or the transfer of their membership to the new branch, they should collectively record this by petition to the current branch secretary, the branch secretary of the new/transferred branch and the regional/national officer or organiser as appropriate. Under these circumstances, the regional/national officer or organiser will support further discussions seeking a resolution of the dispute within six weeks. Where a resolution of the dispute is unattainable, the RCM Branch Governance Committee will adjudicate.

A letter from the Branch Governance Committee should confirm or repudiate the formation of a new branch within six weeks of the receipt of a petition.

Under circumstances where there has been a partial transfer of members from one branch to a new branch, there should be an appropriate and proportionate transfer of funds from the old branch to the new branch.

Process for the affiliation of two or more branches

Where two or more branches operating under an employer wish to retain their own identity because of, for example, the geography between significant workplaces, a process of affiliation should be explored.

A request to affiliate to another branch within the Trust or Health Board should be made to the RCM Branch Governance Committee. Your regional/national officer or organiser will be able to assist the branch with this process.

Each affiliated branch can have its own meetings to discuss local issues, but should meet at least once a year with the other branch to discuss Trust or Health Board-wide issues. In addition to electing its own workplace representatives (steward, health and safety representative and learning representative) and MSW advocates, each affiliated branch would also need to elect its own branch officers (chairperson, secretary and treasurer). Affiliated branches may also wish to explore forming a committee with representatives of each affiliated branch committee to help co-ordinate activity.

Affiliation of a midwifery society to a branch

A university midwifery society may make an application to the RCM Branch Governance Committee seeking affiliation to one or more RCM branches. To be eligible for affiliation 75% of the members of the midwifery society must be RCM members and the local student union should have agreed to it in writing. The midwifery society should contact the appropriate country director (Scotland, Wales and Northern Ireland) or head of organising and engagement in England, who will contact the branch(es) to establish whether the affiliation is acceptable. This may require consultation with branch members or a show of hands at a quorate RCM branch meeting.

A request will then be made to the Branch Governance Committee using a form www.bit.ly/MidSocRCM to confirm the affiliation and have the affiliation recorded on the RCM membership database.

Midwifery society branch affiliation should be reviewed every three years.

The role of branch officers and honorary president

An effective branch requires active and autonomous branch officers. In addition, the branch may also appoint an honorary president who will act as an ambassador for the branch and the RCM. The president does not have to be an RCM member but will have an interest in the maternity service. The president will not be a member of the branch committee or have a decision-making role within the branch. The role of the honorary president is to:

- preside over any official RCM branch functions as requested. This will include the annual AGM
- be an ambassador for the branch and the RCM as a whole

The branch committee

The branch committee should comprise at least six members and include the branch officers. The officers of the branch should consist of the chairperson, secretary and treasurer. All branch officers must be members of the RCM. An overview of each of these roles is included below, and supplementary information can be found in Appendix 2. Information on the election, resignation and deselection of branch officers' can be found in the next section.

Branch chairperson

The chairperson presides over meetings to maintain good order, ensures that all members have an opportunity to express their views and decides when a subject should be put to a vote. It is the chair's responsibility along with the secretary to produce the agenda for each meeting and sign off the minutes of previous meetings once they have been approved by the committee as an accurate record. A vice chairperson may be elected to act for the chair in their absence. Along with the branch secretary, the branch chairperson is the spokesperson for the branch and shares a certain amount of responsibility in terms of communicating with members and with the regional/national officers and organisers.

The RCM branch chairperson provides leadership to the branch and to members of the branch committee as required to ensure that the branch functions effectively and helps support the delivery of the RCM's strategic objectives. The branch chair is also responsible for:

- ensuring that the branch complies with the RCM branch constitution and that the branch
- committee provides effective management of the branch and its finances (in conjunction with the branch treasurer)
- chairing all general and committee branch meetings to ensure that they comply with the RCM branch constitution and contribute to the effective functioning of the branch
- developing (in conjunction with the other Committee members) an annual branch review, a copy of which should be submitted to RCM headquarters
- leading on the resolution of any internal membership or wider disputes within the branch

Please also visit Appendix 2 for further information.

Branch secretary

The branch secretary is responsible for the smooth running of the branch, arranging meetings, taking notes and ensuring that members are kept informed of branch/RCM activities. They are the official correspondent of the branch with RCM headquarters, regional/national officers and organisers, NHS Trusts and Health Boards, and other organisations. They also have responsibility for maintaining annual lists of branch members (contact RCM membership for this), receiving applications for membership and regularly notifying RCM headquarters of changes in branch membership and changes of branch officers, workplace representatives and MSW advocates. The RCM now requires all branches to complete an annual branch review outlining branch activity for the previous year and it is the secretary's responsibility to produce this and present it for agreement at the branch AGM.

The role of the branch secretary may vary depending upon the size of the branch, but will typically also include the following:

- acting as the strategic lead officer and co-ordinator within the branch: leading the branch committee in ensuring that the branch adheres to the RCM's rules, supports RCM campaigns and works towards helping to achieving the RCM's strategic objectives
- facilitating and encouraging partnership and team work working within the branch committee; managing the delegation of work to other branch officers and representatives as appropriate, and providing support and guidance as required; co-ordinating all branch negotiations and industrial relations matters
- supporting, mentoring and encouraging stewards and other workplace representatives within the branch on an individual and collective basis; supporting the development of new workplace representatives and stewards.
- ensuring that the representation of branch members is in accordance with national guidance in partnership with the local regional/national officer. Ensuring proper organisation of all workplace and branch election processes in accordance with RCM election procedures

- maintaining a list of members, receiving applications for membership and notifying RCM headquarters of changes in branch membership and changes of branch officers, stewards, health and safety representatives, learning representatives and MSW advocates
- ensuring that the branch processes membership applications promptly and accurately and maintains records in accordance with the RCM's membership guidance and systems
- ensuring consistency with the RCM's policies on GDPR with particular attention to maintaining the privacy of branch members (see statement in Appendix 7)
- arranging and attending all general and committee branch meetings and producing accurate notes promptly following a meeting; ensuring that branch records are produced and maintained in the appropriate manner
- ensuring that there is regular communication with branch members around headquarters campaigns, negotiations, issues, branch developments and activities
- communicating with the wider union including national/regional staff and staff in headquarters on behalf of the branch
- ensuring that branch members are aware of opportunities to take part in the activities of the wider union

Please also visit Appendix 2 for further information.

Branch treasurer

The treasurer is responsible for the financial stewardship of branch funds on behalf of the branch and RCM headquarters. Their duties include managing the branch bank account, paying bills, scrutinising expenditure, informing the branch of the financial position, advising on the necessity to raise funds, receiving income, including the 'block grant' (please see page 10), and preparing the annual financial return that is submitted to RCM headquarters. The treasurer is also responsible for the proper recording of all financial transactions and protecting branch funds from fraud or abuse. It is not solely the treasurer's responsibility to raise money on behalf of the branch. All branch officers and the branch committee share the responsibility of raising money for expenditure (see Appendix 8 for further guidance on branch fundraising).

The treasurer is responsible for the accurate recording of all financial transactions that occur within the branch and is acting on behalf of the branch and RCM headquarters. The RCM branches are an integral part of the RCM and they are embedded within its structure. The branches are responsible for their own finances and funds, but at the same time their funds are part of and belong to the RCM. This means, for example, that if the branch for any reason becomes dormant or is unable to fulfil its obligations towards its members, the funds must be automatically returned to RCM headquarters.

If a treasurer stands down or resigns their position, there are a number of tasks that need to be completed. Any petty cash float should be returned along with any receipts for monies spent. All outgoing treasurers have a duty to brief the new treasurer fully about branch finances and to inform RCM headquarters as soon as possible of the name, membership number and address of the new treasurer. The bank will also need to be contacted to change the signatory details on the branch bank account.

The RCM Finance Team is responsible for the management of the RCM's finances in accordance with RCM's policies. It has a duty to account for all RCM funds and monies, including branch monies. The RCM Finance Team is happy to assist branch treasurers, so if you require advice, information or assistance please contact them at RCM headquarters (see Appendix 4 for contact details).

In order to keep accurate financial records, the treasurer may require:

- a receipt book with carbons or counterfoils
- a cash book
- a standard spreadsheet (copy available under finance folder at www.bit.ly/RCMBranches)
- lettered files for correspondence
- lettered file for vouchers (receipts for outgoing monies)

Cheque books and a bank card will be issued by Unity Bank.

Some branch treasurers will choose to keep their financial records manually, while others may prefer to use an Excel spreadsheet and scan and file documents electronically.

See Appendix 2 for further information.

Election, resignation and deselection of branch officers

The election process for branch officers

The election or re-election of branch officers should take place at the branch's AGM or at the point that a branch officer position becomes vacant. The nomination of all branch officers and branch committee members must be proposed by a member and seconded by another member after the nominee's consent has been obtained. The branch chairperson (or acting branch chairperson if this position is vacant) will ask a vote by a show of hands from the members present at the meeting.

All members of the branch are eligible to stand as a branch officer.

After the AGM the branch secretary should complete the branch information form (available on the RCM website and the online branch resources – www.bit.ly/RCMBranches) and forward it with the other AGM papers to activists@rcm.org.uk. On receipt of these, the new branch officer will be sent a letter confirming details of their RCM regional/national officer and organiser, and information on forthcoming training days. They will also be directed to resources on the RCM website.

The effective functioning of the branch committee is largely dependent upon having all branch officer posts filled. If a branch officer post remains unfilled, the regional/national officer or organisers regional/national officer or organiser will work with the branch to try and resolve the issue as quickly as possible.

Resignation, de-selection and removal of branch officers

If a branch officer wishes to resign from their position at any point during their term, they must first inform other members of the branch committee of their intention. If there are issues or concerns which the branch officer has, the regional/national officer or organiser regional/national officer or organiser should be informed, who will seek to try and resolve these to allow the branch officer to continue in their role. If the branch officer still wishes to resign and there are no outstanding issues or concerns, they must inform the membership team at RCM headquarters of their decision so that the RCM membership database can be updated accordingly.

All outgoing branch officers should where possible have a handover with their replacement to ensure continuity of branch activity. Outgoing officers will also be sent an evaluation form to provide the RCM with more information about how to support the role.

If there is concern regarding the capability or conduct of a branch officer, this can be raised informally with other branch officers who may seek an informal discussion with the branch officer to address those concerns. If the issue cannot be resolved informally the advice of the regional/national officer or organiser should be sought.

If a branch or RCM member of staff receives a complaint about the capability or conduct of a branch officer, a meeting will need to be convened with the branch officer concerned, an appropriate representative of the branch and the regional/national officer to discuss the complaint and next steps. It may be deemed appropriate at that point for the branch officer to suspend their duties.

The next steps could include a resolution of the issue and taking no further action, further training or mentorship, the resignation of the branch officer or the de-selection of the branch officer by the branch.

The de-selection of a branch officer should never be undertaken lightly, but may need to be implemented in the best interests of the individual branch officer, RCM members, the branch and the reputation of the RCM.

In extreme circumstances and in consultation with the RCM branch, the branch officer may be removed by the director of the relevant UK country office (Northern Ireland, Scotland, and Wales) or the regional head in England.

Circumstances justifying removal may include:

- acting against RCM policy
- lack of activity
- misrepresentation of branch matters
- bringing the RCM into disrepute

The branch officer may appeal against this decision to the Branch Governance Committee at Branch.Governance@rcm.org.uk. They should do so in writing within 28 working days. The letter should explain the grounds for appeal which may include:

- the decision was wrong or too harsh
- the procedures were not properly used
- new evidence has come to light

The country director/regional head who removed the branch officer from their role will be excluded from hearing the appeal.

The Branch Governance Committee should respond with a decision within 28 working days.

The Role of RCM workplace representatives and MSW advocates

This section of the handbook provides an overview of the key roles and responsibilities of the RCM workplace representatives and the role of MSW advocates. Tips on getting started for all workplace representatives can be found in Appendix 3 and further information can also be found in the 'Activists' section of the website. Information on the election, accreditation, resignation and deselection of workplace representatives can be found in the next section.

Workplace representatives

'Workplace representative' is a collective term for stewards, learning representatives, and health and safety representatives. They must be elected by members in the workplace, with the branch being responsible for this process. Workplace representatives are the local face of the RCM and the individual members will contact them for immediate help or advice. The workplace representatives' role is covered by legislation, which sets out their functions and rights. There is more information about this in Appendix 3.

All workplace representatives receive specific training from the RCM to enable them to carry out their role and have the same rights under the Employment Act 2002 to have reasonable time off to undertake these duties and to complete training. There is more information about this in Appendix 3.

There is an expectation that all RCM workplace representatives take a professional approach to the role and maintain a number of standards when dealing with members and other stakeholders. When carrying out workplace representative duties we would ask that you consider the following:

- you are accountable to your members, so when carrying out any of your duties ensure that you are always open, honest and transparent in the approach that you take
- as a representative in the health sector, you will regularly work with officials from other trade unions, particularly when sitting on employer joint-union committees. It is important that you seek to work together and co-operate with other union representatives and where possible seek to reach a common goal for the benefit of all members
- the basic principle of the work that all trade union representatives do is to work as a team for the collective benefit of members. Representatives regardless of their experience or role within the Trust or Health Board should take a shared approach to their role and workload with the other elected RCM workplace representatives
- experienced workplace representatives and branch officers should support new representatives and help the regional/national officers and organisers to mentor those who are new in post

You may find when dealing with certain members' issues that you need to discuss or seek advice from a more experienced workplace representative or the regional/national officer. Where this is the case, you must seek permission from the member involved before discussing the issue with another workplace representative or the regional/national officer.

Any issue that a member brings to you as their representative must be kept confidential, unless you have their permission to discuss it with others.

The branch should reimburse the workplace representative for legitimate and reasonable expenses incurred while performing their duties, for example:

- travel expenses to RCM regional/national training days and national, local meetings and attendance at the RCM Activists Conference (petrol costs should be paid at the reserve rate[2])
- travel costs associated with representation of members where they have not been met by the employer (petrol costs should be paid at the reserve rate)
- telephone calls made while undertaking RCM trade union duties
- administrative costs arising from representing members including costs of printing reports, etc.

2 NHS Terms and Conditions of Service Handbook. Section 17: Reimbursement of Travel Costs.

Where the workplace representative is working in a workplace that is not covered by a branch or the branch is inactive, expenses will be claimed from RCM headquarters. All claims for expenses should have receipts attached. If the workplace representative is unsure as to the claiming of expenses, the advice of the regional/national officer or organiser should be sought.

All workplace representatives should encourage new colleagues to join the RCM by explaining the benefits of trade union membership and representation and the professional development opportunities that come from being a member.

Steward

RCM stewards recruit, represent and support members in the workplace. The key responsibilities of the RCM Steward include to:

- take a proactive role in the recruitment and retention of members
- represent members in internal meetings with employers
- attend joint negotiation and consultation committee meetings and play an active part on behalf of members
- undertake negotiations on behalf of RCM members, and support and represent members with local changes in the NHS
- support RCM members and the regional/national officer in external meetings (for instance helping them to prepare for an NMC case)
- work with members to establish an active and organised workplace
- positively represent the RCM as a steward to members, other workplace representatives (RCM and other unions), managers and other stakeholders

Additional information on performing the role of the RCM steward can be found in Appendix 3 and in the 'Activists' section of the RCM website.

Learning representative

RCM learning representatives are instrumental in championing the importance of training and development for RCM members in their workplaces. The role of the learning representatives involves:

- explaining and promoting the benefits of learning to colleagues and employers
- signposting colleagues to learning opportunities, both professional and personal
- being involved in conducting a learning needs questionnaire and liaising with management on furthering the learning agenda for midwives and MSWs by identifying and articulating the workplace learning needs of members
- organising learning and development events
- raising awareness on functional skills and assisting members to address these
- raising awareness of lifelong learning issues
- working with members on the NHS Knowledge and Skills Framework (KSF) and/or other relevant competency frameworks used by the Trust or Health Board
- promoting the value of informal learning
- identifying opportunities for joint working with other NHS trade unions, for example, around the development of a local collective learning agreement or sharing examples of good practice
- raising awareness of learning or training opportunities provided by the employer and external providers

Additional information on performing the role of the RCM learning representative can be found in Appendix 3 and in the 'Activists' section of the website.

Health and safety representative

RCM health and safety representatives are dedicated to ensuring our members work in healthy and safe environments, and that employers consider our members' wellbeing at work. Our health and safety representatives are in a unique position to know and identify health and safety issues specific to maternity workplaces, and are key in protecting and assisting members in their working environments. The responsibilities of the health and safety representative include:

- providing representation on behalf of members on health, safety and wellbeing matter
- liaising with the health and safety executive and other external organisations
- attending meetings of the employer's health and safety committee

- building strong and effective working relationships with other RCM workplace representatives, branch officers, regional/national officers and organisers
- establishing records and data that assists with organising
- working closely with other recognised trade unions on matters of common concern
- leading on campaigns related to health, safety and wellbeing in the workplace
- sharing information with the regional/national officers and organisers on any health, safety and wellbeing changes that are affecting the maternity services and/or RCM members
- negotiating with management on any workplace changes that may affect the health, safety and wellbeing of RCM members
- being the RCM lead support on bullying and undermining behaviour issues in the work place
- building and establishing relationships with members in the workplace or through the branches
- providing advice or support on health, safety and wellbeing to our members
- identifying opportunities and issues affecting the RCM and its members

Additional information on performing the role of the health and safety representative can be found in Appendix 3 and in the 'Activists' section of the RCM website.

MSW advocates

RCM MSW advocates are not a formally accredited representative role, but are elected by members to provide a voice for MSWs in their workplaces. MSW advocates are encouraged to stand as an RCM workplace representative should they wish to. The MSW advocate does not have to be a standalone role and can complement any workplace representative or branch officer role that an MSW member wishes to fulfil.

Any Midwife or MSW member can stand for election as an MSW advocate.

The role of the MSW advocate includes:

- acting as a spokesperson and providing peer support to MSW members
- working with RCM workplace representatives in the local branch and workplace
- keeping MSW members and other RCM colleagues informed of changes in your workplace, including news and information from the RCM
- advising the RCM on the development of its membership offer to MSWs
- communicating and networking with other MSW advocates and RCM staff to share information and ideas
- promoting membership of the RCM as the union of choice for MSWs in the workplace

The RCM provides training on advocacy skills to its MSW advocates, and networking and development opportunities for those members fulfilling the role. It is not the role of the MSW advocate to formally represent members regarding workplace issues in formal meetings or other scenarios. They will work closely with RCM representatives and branch officers to ensure that the needs and views of MSWs in the workplace are represented to them and that MSW members are included in all RCM workplace activity.

For more information and support, contact your regional/national officer or organiser. Additional information on performing the role of the MSW advocate can be found in Appendix 3 and in the 'Activists' section of the RCM website.

Election, accreditation, resignation and removal of workplace representatives and MSW advocates

The election process for workplace representatives

The re-election of an existing workplace representative should be notified following the AGM meeting via the branch information form.

The effective functioning of the branch is largely dependent upon having all workplace representative positions filled. Where a branch covers more than one workplace it needs to ensure that as many members as possible in that workplace participate in the election. This is to ensure that workplace representatives are elected by the members they will represent. Any objections to the candidature should first be discussed with the branch committee who may wish to take advice from the regional/national officer or organiser.

To be eligible to be elected as a workplace representative the member must be employed by the Trust, Health Board or employer. This includes a member on a 'bank' contract that is seeking election. This excludes NHSP and agency contractors.

Workplace representatives are elected to serve for one year or up to the next Branch AGM meeting if this is sooner. Workplace representatives must be re-elected for a further term should they wish to continue in the role. The nomination of **ALL** workplace representatives must be proposed by a member and seconded by another member after the nominee's consent has been obtained.

A branch and/or the regional/national officer or organiser must select an election procedure appropriate to the circumstances of the branch. Where possible the election of a workplace representative should take place at a branch meeting: see further guidance below. Where the branch is inactive, the organiser and/or regional/national officer will assist in organising a workplace meeting and fulfil the role of chair and/or secretary on a temporary basis for that meeting only. Alternatively, the regional/national officer and/ or organiser will organise either a 'mobile' election or an online ballot: see further guidance below. Any concerns about the conduct of elections can be directly reported to the Branch Governance Committee at Branch.Governance@rcm.org.uk.

Once a workplace representative's election has been confirmed, the process of accrediting the workplace representative must be followed in order for them to function properly in their role and to ensure the correct legal entitlement and practice (see below).

Election at a branch meeting

The branch chairperson (or acting branch chairperson if this position is vacant) will ask for a proposer and seconder, followed by a vote by a show of hands. Appropriate notice should have been provided and the meeting must be quorate (see section on branch meetings).

Election by mobile ballot

The mobile election involves an election sheet circulated in the workplace where members are invited to provide their signature in support. In such circumstances the particular member's interest should be advertised through posters and email communication to all members at least two weeks prior to the election taking place.

A standard mobile election ballot form will contain the following content:

- name of regional/national officer and/or organiser
- names of proposer and seconder
- name of candidate
- state the representative role being elected
- membership number of voter
- options to vote 'Yes', 'No' or 'Abstain'
- the following statement: "Any concerns regarding the procedure and/or candidate should be reported to <NAME>, regional/national officer and/or <Organiser <address>, <telephone number>, <e-mail address>

Election by online ballot

Online voting must not take place without oversight from a regional/national officer and/or organiser, and should only take place if a meeting or mobile election cannot be held. The ballot should be publicised and remain open for a minimum of two weeks.

A standard online ballot form will contain the following content:

- name of organiser and/or regional/national officer
- names of proposer and seconder
- name of candidate
- state the representative role being elected
- membership number of voter
- options to vote 'Yes', 'No' or 'Abstain'

- the following statement: "Any concerns regarding the procedure and/or candidate should be reported to <NAME>, < regional/national officer and/or organiser >, <address>, <telephone number>, <e-mail address>

The accreditation of workplace representatives

When a member is elected as a workplace representative through any of the above processes, the RCM branch secretary, regional/national officer or organiser will confirm the election to RCM headquarters using the appropriate form (available on the RCM website). Following this, RCM headquarters will write to the human resources department of the employer and head of midwifery confirming the accreditation. This is to ensure that the workplace representative is afforded the legal rights of a representative of a recognised trade union and is kept informed and consulted on matters affecting members.

The workplace representative will be sent an introduction pack and the central membership database will list the new role to ensure the appropriate correspondence from the RCM. The appropriate regional/national officer and organiser will also be informed when a new workplace representative is elected so the appropriate support can be provided. Workplace representatives are also normally expected to complete the introductory training within six months of their election.

Resignation of a workplace representative

If a workplace representative wishes to resign from their position at any point during their term, they must first inform the branch committee. If there are issues or concerns which the workplace representative has, the regional/national officer or organiser will seek to try and resolve these to allow the workplace representative to continue in their role. If the workplace representative still wishes to resign or there are no concerns, they must then inform us via email at activists@rcm.org.uk so that the relevant employer and head of midwifery can be informed of their de-accreditation and the RCM membership database updated accordingly. Outgoing workplace representatives will also be sent an evaluation form to provide the RCM with more information about how to support the role.

De-selection and removal of a workplace representative

If a member has a concern regarding the capability or conduct of a workplace representative, this can be raised informally with other branch officers who may seek an informal discussion with the workplace representative to address those concerns. Branch officers should seek guidance from other branch officers and the regional/national officer or organiser where appropriate. Informal discussions are sometimes the best way for a workplace representative to consider their capability or conduct in the role and their suitability to continue in the role. In some circumstances, the feedback may be enough for the workplace representative to make the necessary improvements.

If a branch officer or RCM member of staff receives a formal complaint regarding a workplace representative, this should be investigated following the RCM complaints procedure under the guidance of a regional/national officer. Information should be sought from the workplace representative in question and other relevant parties.

A meeting will be convened with the workplace representative to discuss the issues raised and establish actions to be taken. It may be deemed appropriate at that point for the workplace representative to suspend their duties while the investigation is being conducted.

The actions to be taken could include an action plan for the workplace representative with a review date or a recommendation to the regional head/country director that their accreditation be removed. The outcome of the meeting will be put in writing to the workplace representative and should be logged with the regional head/country director and branch secretary of the branch.

Circumstances justifying removal of accreditation may include:

- acting against RCM policy
- lack of activity
- misrepresentation of individuals
- misrepresentation of branch matters
- bringing the RCM into disrepute

Accreditation may be removed by the regional head/country director in consultation with the RCM branch. A letter should be issued by the regional head/country director summarising the reasons for accreditation being removed and the information including complaints, investigations and meeting notes that were used to make the decision.

If the workplace representative wishes to appeal against this decision, they should do so in writing within 28 working days to the Branch Governance Committee.

The Branch Governance Committee can be contacted by e-mail on Branch.Governance@rcm.org.uk. The letter should explain the grounds for appeal which may include:

- the decision was wrong or too harsh
- the procedures were not properly used
- new evidence has come to light

The Branch Governance Committee should respond with a decision within 28 working days. The country director/regional head who removed the accreditation will not be involved in hearing the appeal.

Once the appeal procedure is exhausted the branch secretary, the head of midwifery and the director of HR will be informed that the workplace representative is no longer accredited by the RCM and their details will be removed from the RCM database.

The election process for MSW advocates

The re-election of an existing MSW advocate should be notified following the AGM meeting via the branch information form.

The effective functioning of the branch is largely dependent upon having at least one MSW advocate in role. Where a branch covers more than one workplace it needs to ensure that as many members as possible in that workplace participate in the election. This is to ensure that MSW advocates are elected by the members they will represent. Any objections to the candidature should first be discussed with the branch committee, which may wish to take advice from the regional/national officer or organiser.

To be eligible to be elected as a workplace representative the member must be employed by the Trust, Health Board or employer. This includes a member on a 'bank' contract that is seeking election. This excludes NHSP and agency contractors.

MSW advocates are elected to serve for one year or up to the next Branch AGM meeting if this is sooner. MSW advocates must be re-elected for a further term should they wish to continue in the role. The nomination of ALL MSW advocates must be proposed by a member and seconded by another member after the nominee's consent has been obtained.

A branch and/or the regional/national officer or organiser must select an election procedure appropriate to the circumstances of the branch. Where possible the election of MSW advocates should take place at a branch meeting: see further guidance below. Where the branch is inactive, the organiser and/or regional/national officer will assist in organising a workplace meeting and fulfil the role of chair and/or secretary on a temporary basis for that meeting only. Alternatively, the regional/national officer and/or organiser will organise either a mobile election or an online ballot: see further guidance below. Any concerns about the conduct of elections can be directly reported to the Branch Governance Committee at Branch.Governance@rcm.org.uk.

Once an MSW advocates election has been confirmed, the branch and member elected will need to complete an MSW advocate election form. This is available on the RCM website or the branch resources – www.bit.ly/RCMBranches.

Note that as an MSW advocate is not a formally accredited representative, they will not attract the right to paid time off to carry out trade union duties. However, this can be agreed locally with your Trust, Health Board or employer.

Election at a branch meeting

The branch chairperson (or acting branch chairperson if this position is vacant) will ask for a proposer and seconder, followed by a vote by a show of hands. Appropriate notice should have been provided and the meeting must be quorate (see section on branch meetings).

Election by mobile ballot

The mobile election involves an election sheet circulated in the workplace where members are invited to provide their signature in support. In such circumstances the particular

member's interest should be advertised through posters and email communication to all members at least two weeks prior to the election taking place.

A standard mobile election ballot form will contain the following content:

- name of regional/national officer and/or organiser
- names of proposer and seconder
- name of candidate
- state the representative role being elected
- membership number of voter
- options to vote 'Yes', 'No' or 'Abstain'
- the following statement: "Any concerns regarding the procedure and/or candidate should be reported to <NAME>, regional/national officer and/or <organiser <address>, <telephone number>, <e-mail address>

Election by online ballot

Online voting must not take place without oversight from a regional/national officer and/or organiser, and should only take place if a meeting or mobile election cannot be held. The ballot should be publicised and remain open for a minimum of two weeks.

A standard online ballot form will contain the following content:

- name of organiser and/or regional/national officer
- names of proposer and seconder
- name of candidate
- state the representative role being elected
- membership number of voter
- options to vote 'Yes', 'No' or 'Abstain'
- the following statement: "Any concerns regarding the procedure and/or candidate should be reported to <NAME>, <regional/national officer and/or organiser >, <address>, <telephone number>, <e-mail address>

Resignation of an MSW advocate

If an MSW advocate wishes to resign from their position at any point during their term, they must first inform other members of the branch committee of their intention. If there are issues or concerns which the MSW advocate has, the regional/national officer or organiser should be informed who will seek to try and resolve these to allow the MSW advocate to continue in their role. If the MSW advocate still wishes to resign and there are no outstanding issues or concerns, they must inform the membership team at RCM headquarters of their decision so that the RCM membership database can be updated accordingly. All outgoing MSW advocates should, where possible, have a handover with their replacement to ensure continuity of branch activity.

Outgoing MSW advocates will also be sent an evaluation form to provide the RCM with more information about how to support the role.

De-selection and removal of an MSW advocate

If there is concern regarding the capability or conduct of a MSW advocate, this can be raised informally with the branch committee who may seek an informal discussion with the MSW advocate to address those concerns. If the issue cannot be resolved informally the advice of the regional/national officer or organiser should be sought.

If a branch or RCM member of staff receives a complaint about the capability or conduct of an MSW advocate, a meeting will need to be convened with the MSW advocate concerned, an appropriate representative of the branch and the regional/national officer to discuss the complaint and next steps. It may be deemed appropriate at that point for the MSW advocate to suspend their duties.

The next steps could include a resolution of the issue and taking no further action, further training or mentorship, the resignation of the MSW advocate or the de-selection of the MSW advocate by the branch.

The de-selection of an MSW advocate should never be undertaken lightly, but may need to be implemented in the best interests of the individual MSW advocate, RCM members, the branch and the reputation of the RCM.

In extreme circumstances and in consultation with the RCM branch, the MSW advocate may be removed by the director of the relevant UK country office (Northern Ireland, Scotland, and Wales) or the regional head in England.

Circumstances justifying removal may include:

- acting against RCM policy
- lack of activity
- misrepresentation of branch matters
- bringing the RCM into disrepute

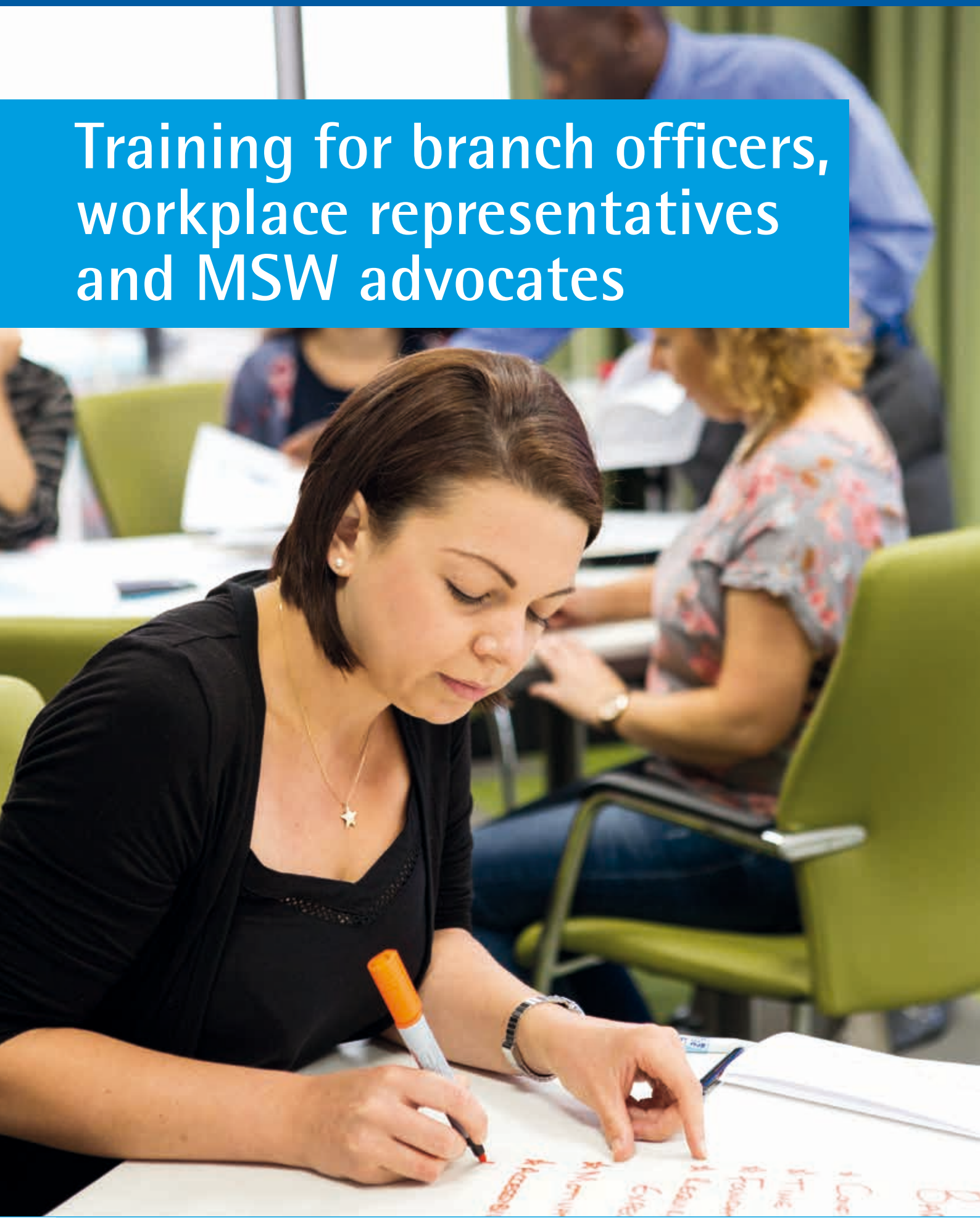
The MSW Advocate may appeal against this decision to the Branch Governance Committee at Branch.Governance@rcm.org.uk. They should do so in writing within 28 working days to the Branch Governance Committee. The letter should explain the grounds for appeal which may include:

- the decision was wrong or too harsh
- the procedures were not properly used
- new evidence has come to light

The country director/regional head who removed the MSW advocate from their role will be excluded from hearing the appeal.

The Branch Governance Committee should respond with a decision within 28 working days.

Training for branch officers, workplace representatives and MSW advocates



Training provided for branch officers

The RCM currently holds training day for all branch officers covering areas such as:

- effective chairing of meetings
- increasing branch activity, engagement and communication
- completing the statement of receipts and payments
- completing the annual branch review
- marketing and membership services
- the role of workplace representatives and MSW advocates

For further information on our training courses, see the RCM website - www.rcm.org.uk/workplace-representative-training.

We have a set of i-learn modules available for branch secretaries, treasurers and chairpersons via the Activists section on i-learn – www.bit.ly/activistsilearn.

Training provided for workplace representatives

The access to free learning and development is one of the greatest benefits for our workplace representatives and it is a requirement of accreditation as an RCM steward, learning representative or health and safety representative to undertake training in order to carry out the role effectively. The RCM provides a number of free training programmes for RCM accredited workplace representatives through a blended learning approach: residential courses, regional training days and annual activists conferences, which are complemented by an element of online learning through i-learn. Workplace representatives can also access the training offered by the TUC[3].

In addition to the residential courses, regional/country training days are held several times a year to update workplace representatives on any skills or changes to policies and procedures, and to allow ideas and experience to be shared among workplace representatives.

These training days are a key part of your learning and development as a workplace representative and you are expected to attend at least two training days per year. You will also have regular contact with your regional/national officer for support, advice and an annual meeting to discuss any further learning or training needs you may have. It is the expectation that workplace representatives will attend activists conferences and report back to branches their activities.

For further information on our training courses, see the RCM website – www.rcm.org.uk/workplace-representative-training.

We have a set of i-learn modules available for workplace representatives via the Activists section on i-learn – www.bit.ly/activistsilearn.

Training provided for MSW advocates

The RCM currently holds training days for all MSW advocates and you are encouraged to attend our regional/country training days as well as activists conferences; MSW advocate training is a chance to network with your peers and develop new skills in recruitment, communication and leadership while getting the opportunity to update RCM staff of news and views from your region and workplace.

For further information on our training courses, see the RCM website – www.rcm.org.uk/workplace-representative-training.

We have an i-learn module available for MSW advocates via the Activists section on i-learn – www.bit.ly/activistsilearn.

3 In RCM Northern Ireland it is the Irish Congress of Trade Unions (ICTU)

Organising branch events

A set of online resources are available for branches to use to engage and organise events. This includes lots of guidance, templates and information on our key campaigns – **www.bit.ly/RCMBranches**.

Marketing and using the RCM logo

All RCM communications including those produced by branches need to express the RCM's values of integrity, professionalism and dynamism. It is important that the RCM logo, visual assets and corporate colours are used consistently on all materials. If the branch wishes to use the RCM logo, advice and support can be obtained from the regional/national officer, organiser or marketing advisor at RCM headquarters (see Appendix 4 for contact details) or email marketing@rcm.org.uk.

Ordering promotional materials

If you are an **existing RCM workplace representative** and would like to order marketing material such as membership forms, pens, lanyards to support an event or activity you are holding to encourage RCM membership, log on to the new link to the storefront below.

Note that this form is only open to RCM workplace representatives. Each name will be checked against our membership database. Members who want materials need to contact the RCM directly.

If you have not registered with the site before:

- click the link – www.bcqgrouponline.com/rcm/Login.aspx
- then click the link on the page that says 'Please click here to request a password'. This will ask for your membership number. Once your name has been verified you will receive your username and password by email
- alternatively, email enquiries@rcmconnect.org.uk with your membership number and email address. Login details will be sent to you within five working days

If you already have registered with the site and hold a username and password:

- click the link – www.bcqgrouponline.com/rcm/Login.aspx and enter your username (your work email address)
- then enter your password (rcm followed by your name, for example, rcmbob)
- once in the storefront, add material to your shopping cart as you would do on a traditional online shopping sites
- when you have made your order, an order confirmation will be sent to your email

If you have any problems, please contact RCM Connect at 0300 303 0444.

Promoting equality and diversity within all branch activities

It is important that branch activities/events are inclusive so that all members are able to participate in the branch. The RCM is committed to equal opportunities and reflecting the diversity of our membership.

We strive to ensure that all members are treated in a fair and equal manner regardless of their gender, race, disability, sexual orientation, age, being pregnant or having a child, religion or belief. When you are organising an activity/event you should try to think about the different needs of your members and whether they will be able to participate in the event. It is good to consider things such as the time of day, the location, how you promote it to members and whether you could make any adjustments to the event to ensure that all members feel included.

Appendix 1: Model RCM branch constitution

Royal College of Midwives (insert name) branch constitution.

Introduction

This branch will be known as the **(insert name)** branch of the Royal College of Midwives (RCM), and is constituted under the provisions of Section 4.7 of the RCM Rules (Sept 2011) which requires every branch to adopt a constitution in a form approved by the general secretary and appropriate to the circumstances of the RCM members.

The **(insert name)** branch is affiliated to the **(insert name)** branch (See Note 1).

[DELETE AS NECESSARY]

The **(insert name)** branch is affiliated to the **(insert name)** midwifery society (See Note 2).

DELETE AS NECESSARY]

The branch will promote and advance excellence in midwifery practice and policy by enabling members of the RCM to meet together for trade union, professional, educational and social purposes. It will encourage, facilitate and support the building of a strong workplace organisation through the recruitment, retention and development of members and activists, as well as support the RCM in the delivery of its strategic objectives.

The branch is accountable to the RCM through the submission of an annual statement of receipts and payments, and the production of an annual branch review.

Branch membership

All RCM members working in workplace(s) within the branch's geographical boundary will be members of the branch. Membership of the branch is open to any member of the RCM who wishes to belong to it or who is allocated to it because of working in the area that it covers.

Branch Organisation

The activities of the branch are organised on behalf of its members by the Branch committee, which consists of the chairperson, secretary and treasurer (see note 3). The members of the committee will be elected annually at the AGM (see notes 4 and 5).

The branch chairperson will preside over all general meetings (see notes 6 and 7).

The branch secretary is responsible for the smooth running of the branch and ensuring that members are kept informed of branch/headquarters activities. They will produce an annual branch review, which once agreed at the AGM, will be submitted to RCM headquarters. The branch secretary will also notify RCM headquarters of changes in membership on an annual basis and when there are changes of branch officers and/or workplace representatives (see note 8).

The branch treasurer is responsible for the financial stewardship of branch funds on behalf of the branch and RCM headquarters, including preparing the annual statement of receipts and payments, which is submitted to RCM headquarters (See Note 9).

The branch shall endeavour to ensure that stewards, health and safety representatives, learning representatives and MSW advocates are supported in their roles and elected at the earliest opportunity to provide representation and support to members (see notes 10, 11, 12 and 13).

Branch meetings

The branch committee will arrange an annual programme of meetings and events to meet the needs of its local members. The branch will hold at least one general meeting for all members each year, namely the AGM.

This meeting will be held before 31 January each year to enable the branch to elect its branch officers and workplace representatives for the year ahead and approve its statement of receipts and payments, and annual branch review, before they are submitted to RCM headquarters (see note 14).

The agenda of each full branch meeting will include a report from the steward, health and safety representative, learning representative and MSW advocate (see note 15).

In order that binding decisions can be made on behalf of all members entitled to attend, no less than five members will form a quorum for this purpose. Decisions relating to matters under discussion will be reached by a show of hands. However, where it is considered appropriate that confidentiality should be preserved, a ballot will be

arranged. If equal votes are received for and against a motion, the chairperson will exercise a second or casting vote to enable a decision to be made.

If for any reason the branch is unable to meet on an annual basis for the purposes of electing workplace representatives, the serving branch chair or secretary can refer the conduct of the election to the RCM regional/national officer. The regional/national officer will then give consideration to conducting either a mobile election or an electronic ballot within the guidance set out in the RCM Branch Governance Handbook.

Closing, merger or splitting of the branch

A decision to merge, split or dissolve the branch will only be taken at an extraordinary general meeting of the branch. The branch may consider closing for reasons of inactivity or as a consequence of reformed branch structures in response to an employer merger or reformation. Notice of such a meeting will be circulated to all members of the branch at least three weeks prior to the date of the meeting, together with details of the exact nature of the business to be discussed including the transfer of members to other RCM branches and the transfer of monies as appropriate. No action will be taken until full consultation has been undertaken with all members of the branch and the regional/national officer/regional organiser (see notes 16 and 17).

Notes

1. According to the RCM Branch Governance Handbook, the branch should be employer based and co-terminus with the Trust or Health Board. However, where two or more branches operating in a Trust or Health Board wish to retain their own identity then a process of affiliation could be explored. If the branch is affiliated, the name of the branch that it is affiliated to should be inserted here.

2. A university midwifery society may make an application to the RCM Branch Governance Committee seeking affiliation to an RCM branch. To be eligible for affiliation 75% of the members of the midwifery society must be RCM members and have the support of the local student union. The country director/head of organising and engagement (England) will contact the branch to establish whether the affiliation is acceptable. Midwifery society/branch affiliation should be reviewed every three years.

3. The branch committee should ideally be made up of a minimum of six members and include the branch chairperson, secretary, treasurer, steward, health and safety representative, learning representative and MSW advocate. Other members may be co-opted onto the committee as necessary.

4. The nomination of all branch officers must be proposed by a member and seconded by another member after the nominee's consent has been obtained. Voting would usually be by a show of hands unless circumstances make it more appropriate for a written ballot to take place. Regardless of the voting method used, all members must be given the opportunity to vote and should be informed of the names of those nominated for office. Should the branch close or become inactive the RCM Branch Governance Handbook provides for officer-led procedures for the election of workplace representatives.

5. All branch officers should be members of the RCM.

6. The AGM should be chaired by the branch chair. In the event that no such appointment has been made, the Branch Governance Handbook provides for regional/national officers and organisers to undertake the role in a temporary capacity to fulfil the requirements of an AGM.

7. The duties of the branch chair include to:

   a. Provide leadership to the branch and to members of the branch committee as required to ensure that the branch functions effectively. The chairperson should be familiar with the procedures governing the conduct of meetings and when called upon to adjudicate upon a point of order their ruling should be accepted as final
   b. Supervise and co-ordinate all branch transactions and activities including drawing up meeting agendas in conjunction with the secretary, signing off minutes from previous meetings once confirmed as a true and accurate correct record and ensuring sound financial management (in conjunction with the branch treasurer)

c. Preside over branch meetings to maintain good order, ensures that all members have an opportunity to express their views and decides when a subject should be put to a vote
d. Chair the branch committee meetings and be responsible (in conjunction with the other committee members) for the development of an annual branch review

A vice chairperson may be appointed to act for the chairperson in their absence. Depending upon the circumstances and in conjunction with the secretary, the chairperson may:

a. Act as co-ordinator within the branch by facilitating and encouraging partnership and team working, managing the delegation of work, providing support and guidance as required, supporting those engaged in branch negotiations and industrial relations matters and lead on the resolution of any internal membership or wider disputes within the branch
b. Support, mentor and encourage stewards and other workplace representatives within the branch and ensuring that the representation of branch members is in accordance with national guidance and in partnership with the local regional/national officer

8. The duties of the branch secretary include:

a. Maintaining a list of members and notifying RCM headquarters of changes in branch membership and changes of branch officers and workplace representatives on an annual basis. Ensuring consistency with the RCM's policies on GDPR with particular attention to maintaining the privacy of branch members (see Appendix 7 of the Branch Governance Handbook)
b. Communicating with the wider organisation including regional staff and staff in headquarters on behalf of the branch; dealing with all correspondence relating to branch business; ensuring that there is regular communication with branch members around headquarters campaigns, negotiations, issues and branch developments and activities
c. Notifying members of all meetings, preparing an agenda in consultation with the chairperson outlining the business and items for consideration and recording the discussions and decisions reached on these matters in the form of minutes of the meeting
d. Ensuring that branch members are aware of opportunities to take part in the activities of the wider organisation
e. Arranging and attending committee branch meetings and producing accurate minutes promptly
f. Ensuring proper organisation of all workplace and branch election processes in accordance with RCM election procedures
g. Producing an annual branch review and presenting it for agreement at the AGM. A copy of this review should be sent to RCM headquarters for information. As part of this work, the branch secretary should provide RCM headquarters with the names and contact details of all branch officers and workplace representatives
h. Dealing with press and public-relations activities in consultation with the chairperson, unless a member has been appointed for this purpose
i. Leading the branch committee in ensuring that the branch adheres to the RCM's rules
j. Supporting RCM campaigns and working towards helping to achieve the RCM's strategic objectives
k. Depending upon the circumstances and in conjunction with the chairperson. Act as co-ordinator within the branch by facilitating and encouraging partnership and team working, managing the delegation of work, providing support and guidance as required, supporting those engaged in branch negotiations and industrial relations matters, and lead on the resolution of any internal membership or wider disputes within the branch
l. Support, mentor and encourage stewards and other workplace representatives within the branch and ensure that the representation of branch members is in accordance with national guidance in partnership with the local regional/national officer.
m. Work with the RCM regional/national officer to ensure that necessary steps are taken to ensure compliance if a call for a ballot for industrial action has been instigated

9. The duties of the treasurer include:

    a. To receive all income and manage the branch bank account, which should be administered by the RCM's preferred bank
    b. To pay all bills and expenses incurred by the branch after approval to do so has been given
    c. To record all financial transactions of the branch in the prescribed form (in accordance with the RCM's finance policies and financial reporting procedures) to show all income received and expenditure incurred, to account to the branch and RCM headquarters for these and for the balances remaining at the end of the accounting period
    d. To present a treasurer's report and annual statement of receipts and payments to the AGM of the branch
    e. To protect branch funds from fraud and abuse

10. The duties of the steward include:

    a. Taking a proactive role in the recruitment and retention of members
    b. Representing members in internal meetings with employers
    c. Attending joint negotiation and consultation committee (JNCC) meetings and playing an active part on behalf of members
    d. Undertaking negotiations on behalf of RCM members, supporting and representing members with local changes in the NHS
    e. Supporting RCM members and the regional/national officer in external meetings, for instance helping them to prepare for an NMC case
    f. Working with members to establish an active and organised workplace
    g. Positively representing the RCM as a steward to members, other workplace representatives (both RCM and other unions) and to managers and other stakeholders

11. The duties of the learning representative include:

    a. Explaining and promoting the benefits of learning to colleagues and employers
    b. Signposting colleagues to learning opportunities both professional and personal
    c. Being involved in conducting a learning needs questionnaire and liaising with management on furthering the learning agenda for midwives and MSWs/MCAs by identifying and articulating the workplace learning needs of members
    d. Organising learning and development events
    e. Raising awareness on functional skills and assisting members to address these
    f. Raising awareness of lifelong learning issues
    g. Working with members on the knowledge and skills framework (KSF) and/or other relevant competency frameworks used by the Trust or Health Board
    h. Promoting the value of informal learning
    i. Identifying opportunities for joint working with other NHS trade unions, for example, around the development of a local collective learning agreement or sharing examples of good practice
    j. Raising awareness of learning or training opportunities provided by the employer and external providers

12. The duties of the health and safety representative include:

    a. Providing representation on behalf of members on health, safety and wellbeing matters
    b. Liaising with the Health and Safety Executive and other external organisations
    c. Attending meetings of the employer's health and safety committee
    d. Building strong and effective working relationships with other RCM workplace representatives, branch officers, regional/national officers and organisers
    e. Establishing records and data that assists with organising
    f. Working closely with other recognised trade unions on matters of common concern
    g. Leading on campaigns related to health, safety and wellbeing in the workplace
    h. Sharing information with the regional/national officers of any health, safety and wellbeing changes that are affecting the maternity services and/or RCM members
    i. Negotiating with management on any workplace changes that may affect the health, safety and wellbeing of RCM members
    j. Being the RCM lead support on bullying and undermining behaviour issues in the workplace

k. Building and establishing relationships with the members in the workplace or thorough the branches
l. Providing advice or support on health, safety and wellbeing to our members
m. Identifying opportunities and issues affecting the RCM and its members

13. The MSW advocate is responsible for supporting and promoting the interests of other MSWs in the branch. The MSW advocate is not a formally accredited representative role and therefore members would also have to occupy one of the RCM workplace representative roles to receive facility time. The MSW advocate cannot formally represent members regarding workplace issues in formal meetings or other scenarios, but should work closely with RCM workplace representatives and branch officers.

14. The secretary should notify all members that a meeting is due to be held at least seven days beforehand, stating the date, time and place of the meeting and outlining the business to be discussed in the form of an agenda. For the AGM, the period of notice given to members should be at least 14 days. Notice of meetings should as a minimum be posted on appropriate noticeboards within each branch workplace. Promotion by email and on social media will also be used where time and resources allow.

15. The steward, health and safety representative or learning representative may call an ad hoc meeting of branch members to discuss employment relations, health and safety and/or learning issues, and the secretary should be informed of such meetings taking place. The findings or recommendations that come out of these meetings must be reported at a branch meeting.

16. Following consultation with all members, the branch may be dissolved, if a resolution is passed by a majority of members present and voting at an extraordinary general meeting. A formal motion must be put before the members to decide the distribution of branch funds, which must be one of the following options:

a. If the branch members are to join with another branch the funds may be transferred to that branch
b. If members of the dissolved branch are transferring their membership to more than one branch, the funds can be divided between members of the new branches per capita
c. The funds may be transferred to the general fund of the RCM, where they will be held for a period of five years. If the branch re-opens within that time, the funds will be returned to the branch

17. Once the formal motion is proposed and seconded and a resolution to dissolve the branch passed, a formal request to complete this action must be made to the RCM Branch Governance Committee (please see RCM website). Once approval has been granted, all of the branch records including the accounts must be returned to RCM headquarters. A final audited account of the statement of receipts and payments must be sent to RCM headquarters, as well as the minute book, treasurer's accounts and all other records of the branch. The bank should be instructed to transfer their funds to the RCM general fund held by Unity bank.

Appendix 2: Supplementary information for branch officers

This appendix provides supplementary information and guidance to the chapter on the 'Role of branch officers', particularly focusing on meeting management.

The chairperson

Is a very important role in a branch and most people can recognise skilled chairing of a meeting.

A skilled chairperson:

- is prepared for the meeting and has considered the management of each agenda item, information needed, potential options or decisions
- works effectively with the branch secretary and branch treasurer and delegates effectively
- makes sure that everybody is informed of the business of the meeting
- is consistent in their management of the meeting and their handling of people
- provides the opportunity for everyone to speak should they wish to and is responsive to the meeting
- doesn't speak any more than they personally need to and facilitates information giving to the meeting from others
- keeps the meeting within time and therefore politely and authoritatively controls time spent on each agenda item
- remains calm and good natured under pressure
- is knowledgeable about branch governance and helps others to understand the rules and make them work for everyone
- guides the branch in effective decision making: avoids drawing conclusions or making decisions in undue haste or without sufficient information

Skilled chairing of a meeting can be learnt through training, coaching or mentoring but some personality types will always find it difficult to operate effectively in the role. The wrong person in the role of chair can set the wrong tone for the meeting and branch, and be a negative influence on its effectiveness. Often a chair's strengths and weaknesses can be complimented by the overall qualities of the branch committee.

Self-awareness is a positive attribute in a chair along with the ability to draw on the strengths of others in a branch committee which can be advantageous in achieving effectiveness.

There are some basic practices that chairs can adopt that encourage participation and growth in branch attendance. They are:

- opening the meeting by introducing themselves, welcoming attendees and new members
- starting a meeting by reviewing the overall agenda and giving all members the opportunity to understand the main items of business
- highlighting any adjustments to the agenda before commencing with the main business of the meeting, they may wish to provide an overview of what has been achieved since the last meeting
- at the start of each major agenda item, they may want to provide a short introduction in order to aid member's understanding of the issue and encourage participation
- if discussions become side-tracked, take appropriate action to return the focus to the agenda item being discussed
- when a particular agenda item has been covered, it is helpful to summarise the key points of the discussion and confirm any resulting action points with timescales for completion and who they have been assigned to outside branch meetings, the chair needs to be able to lead an effective team in the branch committee

Developing a sense of what the branch's priorities should be with a full understanding of local issues and national priorities in order to guide the activities of the branch. The ability to develop good communication and co-operation between branch officers, workplace representatives, MSW advocates and regional/national officers and organisers is essential. The chair may also be called upon to mediate if there are differences of opinion between branch officers or may have to advise a workplace representative whose conduct is in question (see main sections on resignations and withdrawing accreditation).

The role of branch secretary

The role of secretary is also skilled, which again can be learnt but may not be suitable to some people's

circumstances or personal attributes. It is probably the most time-consuming role in the branch with the amount of time spent often going unobserved by other branch members. A good secretary is:

- organised
- a good time manager
- methodical
- communicative
- adaptable
- a good note taker
- action orientated
- comfortable with technology
- able to involve others where appropriate

Outside meetings, good secretaries put in place personal routines (e.g. deadlines) that enable them to update membership lists routinely, provide notice in good time (seven days for branch meetings, 14 days for AGMs), write up minutes and undertake correspondence and phone calls on behalf of the branch. Secretaries also need to be organised in producing and circulating relevant papers and correspondence prior to and at the meeting. They will also book a meeting room, arrange its layout, ensure that facilities for speakers are organised and working, and that the room is secure after use. If it is difficult to gain access to photocopying facilities, a verbal report of the items being discussed should be read out at the beginning of the meeting so that people can write them down if they wish.

Branch members are showing increasing interest in social media as a way of finding out about their union and branch activity (see Appendix 5 and 6). It's important to strike the right balance with the use of social media.

If you are not personally comfortable with using social media, you could ask branch officers to help under your direction. This can work particularly well in involving members in populating a Facebook page. Notifications for meetings or other important branch business should never be done solely by social media, and if it is being used significantly this should be accounted for at branch meetings. It may be possible to work with the learning representative to provide training so that branch officers and members have a better understanding of the effective use of social media.

It is important that the secretary and chair work well together. Both the chairperson and secretary can benefit from having a short discussion prior to each meeting. It can be helpful to discuss the agenda and allocate discussion time to each agenda item to reflect their importance and complexity.

The agenda should normally cover the following:

- apologies for absence
- minutes of the previous meeting for agreement and signing
- matters arising from the minutes
- correspondence
- branch business
- secretary's report
- treasurer's report
- steward's report
- health and safety representative's report
- learning representative's report
- MSW advocate's report
- guest speaker
- any other business
- date and venue for next meeting

The business of the meeting should be considered in the order stated in the agenda, unless the chairperson with the approval of members present makes necessary adjustments. Any amendments must be agreed and noted. After apologies for absence have been read out and noted, the next item on the agenda is for the secretary to seek confirmation from all those present that the minutes of the last meeting are an accurate record.

This will normally be carried out by a show of hands. The chairperson and secretary can then sign and date the minutes as agreed and the meeting can continue. At this stage, it is usual for discussion to take place on any matters arising from the last meeting.

Consideration should be given to any subject matter in the minutes that may be inappropriate to circulate to all branch members. For example, concerns over staffing or student midwife support. It may be more appropriate for the steward to call a workplace meeting to discuss and record such concerns.

A record of the members who attend each meeting should be kept as part of the branch records. This can be recorded in one of two ways depending upon the typical attendances at meetings:

- list the name of those present in the minutes
- an attendance book can be signed by everyone on arrival

Keeping the flow of the meeting is largely the role of the chairperson but the secretary's support in a busy meeting can be an invaluable asset. During a meeting, the secretary may need to prompt the chairperson in a tactful manner.

The chairperson may need help or clarification on a matter. A secretary, who has all recent correspondence and other relevant papers to hand, perhaps in a folder, can play an important role in effective decision making.

The type of minutes that are required for a meeting can vary as this could differ depending upon the format and content of meeting. These could take the form of:

- action points
- a summary of the discussion leading up to a decision
- action as a result or a verbatim record of what was said

Secretaries also need to provide support to branch executive meetings. These meetings may be less formal than the full branch meetings but nonetheless need to be prepared for and accurate notes kept.

Branch treasurer

The treasurer keeps track of the money. To do it competently and transparently, treasurers should:

- have a command of maths
- have a basic understanding of keeping accounts
- be a confident communicator and negotiator
  be a good presenter of financial information on a page and orally
- be a good record keeper
- be a good planner and forecaster
- be a good team worker

A treasurer has an important role to play in ensuring that a branch can maintain its activities. The treasurer has to control spending undertaken by branch officers, workplace representatives and MSW advocates and be responsible for seeing that new funds are gathered in a timely and appropriate way. The treasurer must make sure that the block grant is used for the purposes that it is intended: see the section on branch finance.

Bank accounts

Every branch must have a current account with Unity bank opened in the branch name and as far as possible all transactions should be made by cheque/bank transfers, signed by two authorised signatories. It is suggested that each branch has four authorised signatories, for example, the chairperson, secretary, treasurer plus one other branch officer or committee member. This is to give the branch more flexibility around signatories as the minimum of two people is always required to authorise any bank transactions. Note that the bank mandate for signatories will require amending when branch officers change.

All monies received should be banked and kept separate from the petty cash. Where a fund-raising activity is organised, any expenses incurred should be paid for out of the proceeds raised and the remaining monies should be banked.

It is important in terms of charity fundraising law that where money has been raised for a specific purpose, it is spent for that purpose (see Appendix 8). A separate income and expenditure account should be set up for major fund-raising activities so that branch members can evaluate the return of their effort. Further information can be obtained from the finance team at RCM headquarters.

Petty cash

A petty cash book (if required) should be kept separate from the cash book to record small payments that are made. A fixed float should be agreed between the treasurer and the branch officers. A cash cheque should be drawn for the amount of the float, which should be entered as a payment in the cash book and as a receipt in the petty cash book. When the float gets low, a cash cheque should be drawn for the exact amount needed to restore the float: for example, if the float is £15 and £10 has been spent, and then a cheque should be drawn for £10.

A voucher should be raised for every petty cash payment made, which should be recorded on the opposite side of the petty cash book. Petty cash in hand should be counted regularly and agreed with the balance on the petty cash book (receipts less payments).

Cash book

It is advisable to use a cash book with detailed analysis columns, which has a total column for receipts and on the opposite side of the book a total column for payments.

This might be complemented by maintaining a duplicate entry on Excel spreadsheets which would enable the sharing of information in branch meetings, a template is available in the finance folder in the branch resources at: www.bit.ly/RCMBranches. The analysis column headings should correspond with items shown on the annual statements of receipts and payments as follows:

- income – receipt analysis headings
  - grant from RCM headquarters
  - donations
  - bank interest
  - sundry (detailed as necessary)
- expenditure – expenditure analysis headings
  - donations (analysis between funds as necessary)
  - donations and subscriptions to other societies
  - other expenses (detailed as necessary)

There should be a total receipts column, which is the total in the relevant analysis column items. This should correspond with the amount paid into the bank and with the receipts shown on the bank statements.

There should be a total payments column, which is the total of the relevant analysis column items. This should correspond with each cheque drawn and with the payments shown on the bank statements.

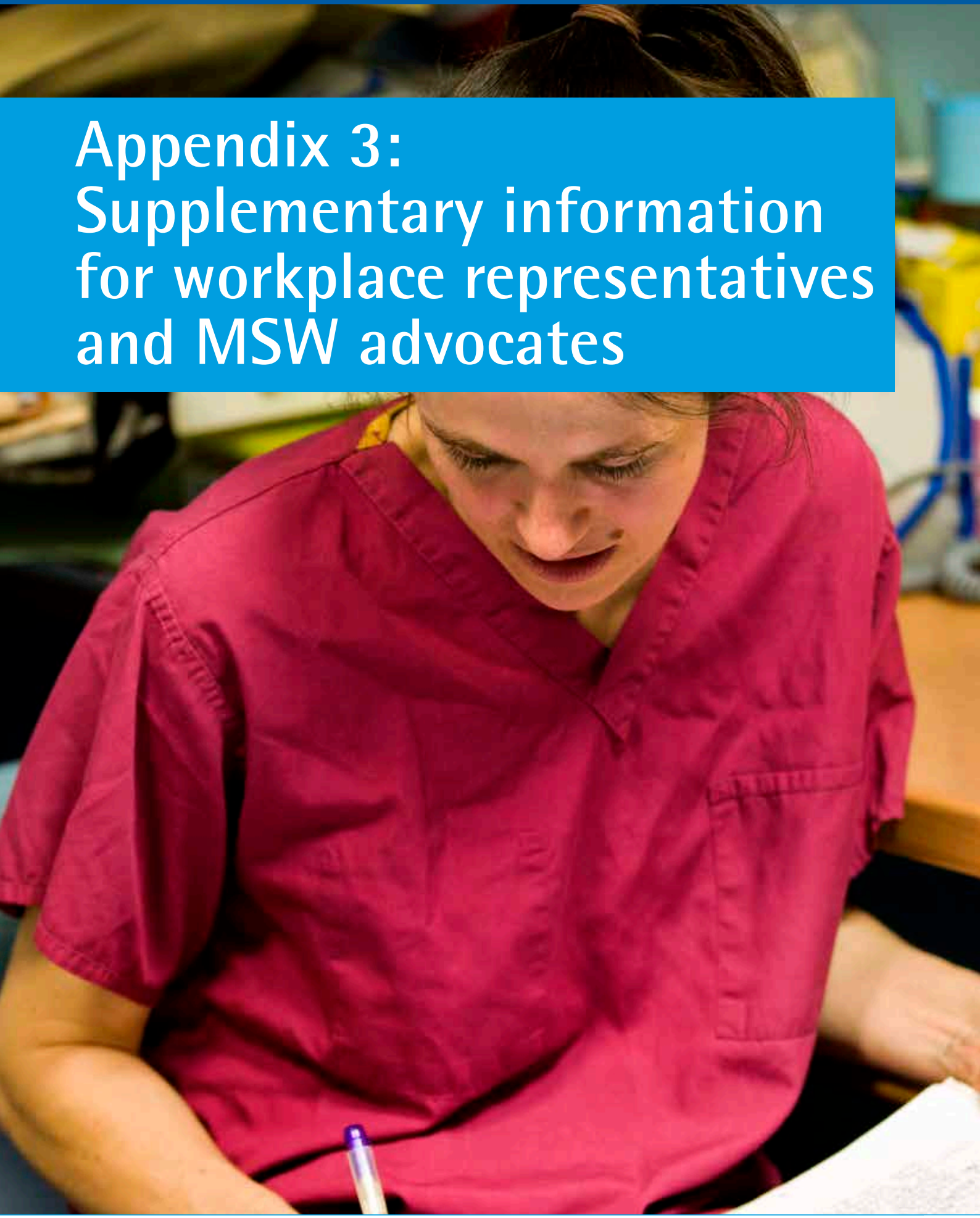
Annual accounting

The annual accounting period and funding cycle for RCM branches is from 1 January to 31 December. The annual branch statement of receipts and payments should be prepared on the form available on the RCM website and returned no later than 31 January each year. Late submission will result in the block grant being reduced on a pro-rata basis. The statement should be produced for approval at the AGM of the branch in advance of this deadline. Individual branches are not required to have their statements audited separately by an external person. The opening balance of the annual branch statement of receipts and payments should be the same figure as the closing balance on the previous year's statement. An analysis should be provided outlining the items making up the final closing balance. With regard to outstanding liabilities, only items relating to the year under review should be shown, but for which cheques have not been made out until the following year. Signatures are required from the chairperson and treasurer.

Failure to submit an annual statement of receipts and statements

If a branch fails to submit an annual statement of receipts and payments for two consecutive years, the RCM will close their Unity bank account to ensure that no charges are incurred. Notice will be given to the branch treasurer or in the absence of a branch treasurer another branch officer. The regional/national officer and organiser will also be informed.

Appendix 3: Supplementary information for workplace representatives and MSW advocates



Tips on getting started for all workplace representatives (for MSW advocates see further below).

Gather information: knowledge is power

Regardless of which type of RCM workplace representative you are, you will need to gather some basic information to ensure that you understand your workplace and membership.

Your training as a representative will provide you with more details on gathering and using information, but initially you should ensure that you obtain and familiarise yourself with:

- an up-to-date branch membership list (so you know who your members – and non-members are, your branch secretary can supply this)
- copies of your employer's disciplinary and grievance procedures
- copies of your recognition and/or facilities agreement
- copies of standard midwife and MSW contracts
- copies of any other union agreements, for example, health and safety, equal opportunities, union learning
- a list of key people, for example, your HOM, practice development midwives, secretaries/administrators who you can book rooms, etc.

All policies and internal agreements should be available through your employer's intranet or HR department. Up to date RCM membership lists can be requested through the RCM's Membership team via email at membership@rcm.org.uk (providing your branch name, role and the purpose for the request. Remember you must keep members' details private and confidential at all times.

Contact your team

It is essential that you get to know the other workplace representatives and MSW advocates in your Trust, Health Board or workplace and also your organiser and regional/national officer. Working collectively will always make you a stronger and more effective representative for your members and your union.

You should also attend RCM regional/country training days as often as possible so you get to know the other workplace representatives and MSW advocates in your region. This allows you to share knowledge and ideas about activism as well as discuss shared issues in your employers which may provide you with the opportunity to work together.

Visibility at work

You need to make sure that members know who you and the rest of the workplace representatives and MSW advocates are. The best way to do this is by talking to people – never underestimate the power of one-to-one communication. Let people know who you are and what your role is, particularly when you have new staff starting work in your maternity department or new student midwives on placement at your employer. And if they're not already members, make sure you have membership forms to hand.

Your facilities agreement should allow for you to have a union noticeboard, so make sure you use it to publicise your role, the RCM, branch meetings and events, and any local, regional or national activities. You can get help with this by contacting your regional/national officer or organiser.

- Members will also need to know how to contact you and importantly, when they can contact you. While members do need to be able to contact you easily, it is not your role to provide a 24/7 service, so you must make it clear where and when you are available. For instance, you may want to display a 'Know your steward' poster on your notice board which gives a work mobile number for calls between 9am and 5pm, and an email address for queries outside of these times. It is not advisable to give members your home phone number. It is important to view your workplace representative role as a position for which you receive paid time off to do, so it should not encroach on your home life.
- It is advisable to set up an RCM representative-specific email address so that all RCM-related correspondence can go to this address, rather than you using your personal or work email address.

Again, your facilities agreement should allow you to set up an email address specifically for union business, so you may want to consider an address such as rcmsteward@<youremployername>.nhs.uk or rcmbranchsec@<youremployername>.nhs.uk[4].

- Remember that private and confidential information could be sent and received in your capacity as a workplace representative (particularly as a steward), so you need to ensure that the address this is sent to is private and secure. You should never use a personal email address which you share (for instance with your partner) for correspondence in your capacity as a workplace representative.
- You should avoid using email to exchange sensitive personal information. If this cannot be avoided, then you should make sure that any exchange of sensitive information is part of an agreed process. This means that both those sending and receiving the information know what is to be sent, what it is for and have agreed how the information will be treated.

Don't worry about not knowing everything

- Taking on the role of an RCM workplace representative may at first seem a little daunting, as there is a lot of information to take on board. It is important to remember that you are not expected to know everything: all experienced representatives have at some point been in your position. One of the greatest things about being an RCM workplace representative is the opportunity for learning and developing your knowledge and skills. If you are asked something by a member that you don't know, be honest and seek advice or information from elsewhere. The member will respect your honesty more than if you make the answer up. Your regional/national officer and organiser are available to support you, as well as other experienced representatives, and accessing all the training that's available will be the key to making you a fantastic representative. There is also a wealth of information and resources available on the RCM website and through i-learn.

Representing members (excluding MSW advocates)

As an RCM representative in the workplace, you are always representing members (and the RCM) in some capacity.

As a **learning representative**, you need to represent your members in effectively communicating the learning and training needs of members to managers and through negotiating learning agreements with employers.

As a **health and safety representative**, it is your job to ensure members are effectively represented when approaching managers with a health and/or safety issue, and that health and safety issues which particularly affect our members in maternity services are appropriately and fully represented to the employer.

It is in the role of **steward** that you will most often be required to represent and support members individually and collectively in a variety of meetings. In the training provided for all the representative roles, you will learn in-depth skills and knowledge required to effectively represent members and it is important that you attend introductory training as soon as possible after your election. However, we appreciate some new stewards may be expected to represent members before they have accessed introductory training and in these instances you should seek advice from your regional/national officer beforehand. Your regional/national officer may arrange for a regional or local training day for you to attend. Another useful way to gain knowledge and skills in representing members is to seek out shadowing opportunities with experienced stewards or your regional/national officer. This will give you the opportunity to see how a real workplace meeting is conducted.

Examples of individual meetings where you may be asked to represent members include sickness absence reviews, grievances, and disciplinary meetings. It is important that whatever the issue a member comes to you with, that you take time to gather as much information from them as possible and review all employer's policies on the issue before advising the member or approaching managers. Consider what advice or support you may need from other stewards or your regional/national officer and discuss options with the member. Whatever the issue the member may have, ensure that you discuss options

4 In Northern Ireland the email format is name@<NAME OF TRUST>.hscni.net

and possible outcomes with the member from the start, so that you can agree a realistic and balanced approach. Any information shared must be kept confidential and not discussed with other colleagues unless you have the express permission of the member.

Representing members on the joint negotiation and consultation committee

The joint negotiation and consultation committee (JNCC) is the main forum in your Trust or Health Board where you will represent the views of RCM members collectively to your employer. The JNCC is known by different names in different workplaces, for example, JNC, JCNC, but they all fulfil much the same function regardless. The JNCC is the forum in which management and representatives of recognised staff unions can discuss and negotiate on matters affecting the interests of employees.

As an RCM steward you are a representative of a recognised trade union and as such you will have a seat on the JNCC. The JNCC will consist of the 'management side', or managers representing the position of the employer, and 'staff side' representatives from recognised staff unions or organisations. (Refer to your employer recognition agreement for details on the how the staff side seats on the JNCC are shared between the recognised unions).

The JNCC is the forum where collective issues such as conditions of employment and policies, job grading, job evaluation, working practices, transfers and redundancies, among others are discussed. Within the NHS certain core terms and conditions are negotiated at national level with the recognised unions, such as pay, hours of work, holidays and overtime rates. The participation of you as an RCM representative on the JNCC is vital to ensuring that the views and concerns feed into any consultation and negotiation process which affects them. It is also vital to ensure that members are kept informed on what changes and developments are happening in the workplace and how negotiations are progressing. It is also important to work together with other union representatives through the JNCC, to try and agree a common approach to present a strong and unified voice in negotiations.

Collective issues that are raised through the JNCC are a great way to get members interested and involved in the RCM and to also recruit new members. When staff can see that the union is actively involved in defending and supporting employees' views, they are more likely to join and engage with the union. Equally, the RCM's position on the JNCC and any negotiations our representatives are involved in are strengthened by being able to demonstrate that we have an active and majority membership in maternity services. This is what we mean by having an 'organised' workforce.

Tips on getting started for MSW advocates

The guidance above is appropriate for MSW advocates, however, this role does not formally represent members at formal workplace hearings or collectively via the JNCC.

It is the role of MSW advocate to recruit new members, to ensure that the views of our MSW members are communicated to the branch and other representatives, and that MSW members get the support and guidance they need.

To advocate means to support and promote the interests of others and we hope that this is what our network of advocates will become – members who act to provide a voice for MSWs in their workplaces.

While the MSW advocate is not a formally accredited representative role, we encourage any MSW member or advocate to stand as an RCM workplace representative should they wish to. The MSW advocate is not a standalone role and can complement any representative role that an MSW member wishes to fulfil.

The Role of RCM workplace representatives, MSW advocates and the branch in organising

Organising and engagement with members

This section provides an outline of union organising and what is expected of RCM representatives and branches when it comes to organising members. The TUC has lots of excellent documents and resources available to union reps and members, including guides to workplace organising at www.tuc.org.uk/publications/. You can also register as a member of the TUC's union reps online forum at www.unionreps.org.uk/. This is a closed

website to trade union representatives where you can discuss topics with other representatives and exchange information and advice, as well as access lots of resources on a variety of topics, such as organising.

The TUC has summarised organising as a union that:

- draws its strength from not just the number of members it has, but also from the numbers of reps and activists
- campaigns on issues that members care about and actively involves them in campaign activity
- among its membership and activists, and through its activity, reflects the diversity of the workers it seeks to support and represent

The TUC's five organising fundamentals:

1. The strength of the union is linked to levels of membership and activity in work.
2. Members are encouraged to work collectively and have opportunities to campaign together on workplace issues that are important to them.
3. Paid officials and union representatives provide support, advice and leadership to assist members to win in their workplace.
4. The union is rooted in the workplace and is not seen as a third-party organisation.
5. The union is inclusive and creates opportunities for involvement and activism for all members.[5]

As representatives of the RCM in your workplace, you are best placed to recruit and organise members in the RCM because you know your colleagues and the environment you all work in. People are much more likely to join or become involved in something if they can recognise themselves in the organisation and empathise with any action or campaigning that is happening.

Additionally, by recruiting members and encouraging them to become involved with the RCM, you are building support for yourself in the work that you do as a representative – you are always going to be stronger working collectively. In order to effectively identify prospective members, the branch should periodically compare the list of employees who are eligible to be RCM members with the list of branch members. A list of employees can be obtained through a request to human resources. With the exception of MSW advocates, as a representative of a recognised trade union you are entitled to receive this information.[6 7]

A list of members can be obtained via email membership@rcm.org.uk providing your name, role, branch/workplace details and purpose of request.

The information requested and received in support of recruitment and organising activity is subject to the General Data Protection Regulations (Appendix 7). Key points for RCM activists in keeping data safe are:

- member details should only be used for the purposes of recruitment and organising
- computers and files where member details are held must be secure from unauthorised access
- lists of member details should always be destroyed securely

Your RCM branch should be the hub of any organising activity. The branch is provided with funds to benefit all members and to help with any actions you want to take as a branch. Whether the branch is organising a social activity, putting money towards campaign materials or arranging meetings, all of this work boosts members' and non- members' involvement with the RCM. Organising around a particular issue or campaign is always the best way to get people involved. For instance, the RCM saw lots of new and existing members getting involved with RCM activity during the 2014 NHS pay campaign. This was an issue that impacted on midwives and MSWs and something that they cared enough about to act.

Organising is also the way in which workplace representatives and branch officers can sustain the RCM in their workplaces and succession plan for future activists. By organising and recruiting new members, you can identify and mentor your successors so you can be assured that high-quality representation and support for members will continue.

You can get information and support with organising activity from your regional/national officer or organiser.

5 Organising at work: Building stronger unions in the workplace – Trades Union Congress, July 2008
6 ACAS Disclosure of Information to Trade Unions for Collective Bargaining Purposes, Code of Practice 2 (2003)
7 Northern Ireland Labour Relations Agency (LRA) Code of Practice on Disclosure of Information to Trade Unions for Collective Bargaining Purposes (2003).

Effective communication

Good communication is the cornerstone of any organising activity and having an active and engaged membership.

Advice and support on effective communication can be gained through your organiser, as well as the TUC resources highlighted previously. The key areas of effective communication are outlined below:

- **Keep your fellow workplace representatives, MSW advocates and branch officers informed.**
  This is the best way to ensure you have the support you need and to make sure other RCM activists can help you keep members informed. One of the biggest roles of the branch is to communicate with members, so make sure you are giving the branch officers the information they need to give to members. Obviously, it is important that you always maintain confidentiality, particularly if you are dealing with individual workplace issues.
- **Keep your members (and potential members) informed.**
  Letting your members and non-members know what is happening in your workplace and in the RCM more widely is vital, as it is the way to demonstrate and promote the work that you and the RCM are doing for them. There is no one good way to communicate with people. Everyone takes in information in different ways, so be prepared to use a number of different techniques through your branch, for example, noticeboards, emails, branch meetings, branch Facebook page or Twitter. Most importantly, do not underestimate the power of a one-to-one conversation.
- **Keep yourself informed.**
  Ultimately, keeping yourself up-to-date will make your role as a representative easier. As already stated, make sure you attend training regularly, network with fellow representatives and activists, keep in touch with what is happening with the RCM nationally and attend your JNCC to maintain your local knowledge.
- **Listen to your members.**
  Hold regular discussions and visible activity in the workplace, such as walkabouts and trolley dashes. Ask for their feedback via the branch Facebook page or Survey Monkey, which is free for email surveys limited to ten questions (see help.surveymonkey.com/categories/Design_Manage).
- **Keep your regional/national officers and organisers informed.**
  Your regional/national officers and organisers are an important part of your support network. Make sure they know of anything important happening in your workplace so they can provide advice and support if you need it.

Further advice for stewards

For the role description and election process, go back to the main text on the roles of workplace representatives.

The RCM aims to have at least one steward in each maternity workplace – for instance in Trusts or Health Boards that cover more than one hospital or maternity unit, we endeavour to have a steward in each. It is important for members to be able to contact a steward who knows their working environment, who they recognise and can easily contact for advice. In this regard, in larger departments we will ideally have more than one steward in every workplace. Stewards are elected (and then re- elected each year) by the group of members that they represent – namely the members of the RCM branch that they belong to. For further information on the election process, see the 'Election and accreditation of union representatives' section in this handbook.

The kind of person who is interested in this role would probably be someone who enjoys taking leadership positions, who can support people through difficult times, is an able problem solver, can manage sometimes difficult relationships with diplomacy where needed, can cope with conflict, is robust under pressure and can pay attention to detail.

As an accredited RCM steward you have access to important rights and benefits:

- dedicated residential stewards' training, regular workplace representatives study days, and continuing professional development through the RCM e-learning platform, i-learn
- monthly RCM workplace representatives' mailings
- RCM advice and information – not just on issues you may face as a steward, but also advice and information for your career in midwifery services
- support and advice from your regional/national officer should you have to deal with a serious issue at work

- support and advice from your organiser on recruitment, organising and building activity in your workplace

The RCM is an officially recognised trade union by the NHS Staff Council and therefore stewards employed by the NHS also have rights to the following:

- paid time off for duties concerned with negotiation/consultation, meetings with members, meetings with other union representatives and officers
- paid time off for attending union training and events concerned with your duties as a steward

Your own Trust or Health Board will have a trade union facilities agreement (negotiated by the joint staff committee), which should provide the following rights:

- access to appropriate private accommodation (an office), with storage facilities for documentation, appropriate administrative facilities and access to meeting rooms
- access to internal and external telephones with due regard given for the need for privacy and confidentiality
- access to appropriate internal and external mail systems
- appropriate access to the employer's intranet and email systems
- access to appropriate computer facilities
- access to sufficient notice boards at all major locations for the display of trade union literature and information

It is important that you obtain a copy and familiarise yourself with your employer's own facilities agreement to ensure that you know and can request the appropriate facilities and time off to do your role as an RCM steward effectively. A copy

of this agreement can usually be found on your employer's intranet system or requested from the HR department. Details of time off and facilities for trade union representatives are also outlined in the Agenda for Change Terms and Conditions of Service Handbook (Part 4, Section 25)

For further information on your right to time off for union duties and activities, visit the Acas website at www.acas.org.uk[8] and search for the Acas Code of Practice 3: Time Off for Trade Union Duties and Activities. It's important that you explain your role to your manager and make reasonable arrangements to fulfil the role during working time. If you have difficulties with this, please contact your regional/national officer or organiser.

Further advice for learning representatives

RCM learning representatives are instrumental in championing the importance of training and development for RCM members in their workplaces. For the role description, please refer to the main text on the roles of workplace representatives.

The sort of person who will thrive in this role will probably be someone who likes working with other people co-operatively and takes an interest in the development of others. Some members have found the role useful in preparing for teaching and practice development roles. Other members have got a great deal of satisfaction out of being able to identify learning opportunities that would improve the quality of working life for them and their colleagues. If you have a personal passion for learning, it can only inspire others and be a very good start in this role.

Getting started is often the hardest thing for learning representatives. It takes time for people to understand your role and the difference you can make. You will need to be persistent in finding opportunities to introduce yourself and explain your roles and the plans you are developing. You will need to develop new partnerships with managers, supervisors, practice development managers and heads of midwifery.

Start small. Put on a lunchtime workshop on a topical subject such as revalidation with the help of your organiser. And learn from the experience. How many people attended? What did they say that was of value in the session? Were there other topics raised that could be explored at a later date? Were there people who could not attend but would have liked to and if so, why?

Spend time finding out what members need to learn. It might be about new regulations, techniques, issues or practices. It could be getting more confident with technology. You can find out through conversation or workshops. Or you can do a learning needs survey – a template is available through your organiser. Don't

8 www.lra.org.uk/ in Northern Ireland

ignore your own instincts about useful learning in the workplace. And be an example to others on how you pursue and maintain your personal learning. If there is something that you are not confident about, challenge yourself and share the experience with others. Sometimes all people need is inspiration.

Your initial introductory training will be a valuable source of input. As a learning representative, you have a legal right to paid time off to train to perform your role. Make sure that you have notified your manager a few months in advance and seek the support of your regional/national officer or organiser if you have difficulty getting this time off.

You will have an opportunity later on to build on your knowledge and experience by attending a second residential training. It is important that you make the most of your meetings with other learning representatives from other Trusts and Health Boards as they can often be a great source of support and inspiration. You may also want to consult with other learning representatives from other unions in the Trust or Health Board and find ways to work with them.

As an learning representative, you have access to a range of information and support through the RCM such as:

- continuing professional development through the RCM e-learning platform, i-learn
- the RCM's Learning Representative newsletter
- support and advice from your organiser
- access to your RCM regional/national officer

It's important that you explain your role to your manager and make reasonable arrangements to fulfil the role during working time. If you have difficulties with this, please contact your regional/national officer or organiser. Further information on time off for learning representatives and facilities can be found in the Agenda for Change Terms and Conditions of Service Handbook, the Acas Code of Practice 3, and your own employer's facilities agreement.

Further advice for health and safety representatives

RCM health and safety representatives are dedicated to ensuring that our members work in healthy and safe environments, and that employers consider our members' wellbeing at work. Our health and safety representatives are in a unique position to know and identify health and safety issues specific to maternity workplaces and are key in protecting and assisting members in their working environments. For the role description, see the main text on the roles of workplace representatives.

The sort of person who may enjoy this role might be someone who is interested in the welfare of other people, likes to acquire knowledge, understands sometimes complex issues, is a good problem solver, has a sense of fairness and can be quite authoritative when they need to be. The health and safety concerns of midwives and other maternity workers can be varied, covering issues such as:

- personal safety
- safe systems of working and preventing accidents
- managing stress and preventing overworking
- tackling bullying and undermining behaviour
- sickness absence

A health and safety representative is sometimes the person who makes all the difference during times of misfortune at work. Their intervention when an accident occurs could protect someone from repercussions down the line. These could relate to sickness absence, managing a return to work or maybe supporting a member in receiving financial compensation that allows them to move on with their life.

Health and safety is an essential part of the work of trade unions. You will find that there are many networks dedicated to this subject, not least through the TUC of which the RCM is now a member.

As an RCM health and safety representative, you are provided with a range of information and support to carry out your role:

- dedicated residential health and safety representatives' training, with specific elements focusing on health and safety issues in the maternity workplace, as well as continuing professional development through the RCM e-learning platform, i-learn
- access to your RCM regional/national officer

Paid time off for health and safety representatives to carry out their duties is provided in the Safety Representatives and Safety Committee Regulations 1977, details of which

can be found on the Health and Safety Executive website[9]: www.hse.gov.uk[10].

It is important that you explain your role to your manager and make reasonable arrangements to fulfil the role during working time. If you have difficulties with this, please contact your regional/national officer.

9 In Northern Ireland time off Health and Safety Reps is covered by the Health and Safety (Consultation with Employees) Regulations (Northern Ireland) 1996.
10 In Northern Ireland information can be accessed at www.hseni.gov.uk

Appendix 4: Useful contacts

RCM Connect

RCM Connect is the single point of contact for all enquiries and to reach all members of staff. You can call RCM Connect 24 hours a day, seven days a week. It's free from a landline and included in your bundled minutes from a mobile.

Call 0300 303 0444 and choose the relevant option:

Option one is for membership queries which include:

- changes to personal details such as names, addresses or emails
- changes to your place of work
- changes in your circumstances which might mean a change of membership category (for example, retirement)
- if you're going on maternity leave and would like to claim the discounted rate
- if you're claiming back the tax on your membership subscriptions

Option two is for employment advice from your national office – England, Scotland, Northern Ireland or Wales.

National offices are open 9am to 5pm, Monday to Friday, excluding UK Bank Holidays.

Option three is for any other enquiry, to speak to a known member of RCM staff, or just to leave a message.

Appendix 5: Guide to setting up a branch Facebook group

Introduction

A branch Facebook group is a 'group page' on Facebook which has been set up by an RCM branch which is formally recognised by the RCM Branch Governance Committee. Facebook pages have the facility to host discussions, to share information about activities and events and for documents and other resources to be shared.

We also encourage branches to create their own Twitter account as this can be a great way of promoting your activities, keeping in touch with other RCM branches and wider RCM activities (via @MidwivesRCM) as well as building professional and union networks.

What you can do with a branch Facebook group:

The value of branch Facebook groups is that they allow branch members who are located across a large Trust or Health Board to communicate and engage with the RCM. Attending branch meetings can be difficult with many demands on our time, so a branch Facebook group is an innovative way of allowing members to interact to share their ideas and keep the RCM strong.

In addition, there is guidance in *Appendix 6* on facilitating a branch meeting via a Facebook live video stream to encourage members who may find it difficult to attend meetings to participate with local RCM.

There should not be formal communications from the branch on the Facebook page if they are not also available through more traditional means such as the noticeboard or workplace meetings. The branch Facebook group cannot replace or replicate the AGM or the election of branch officers, workplace representatives or MSW advocates where sufficient numbers of members should physically attend.

In the event of industrial action being called by RCM, you should take advice from a regional/national officer before referring to it anywhere in your branch Facebook group.

Case studies

Maidstone and Tunbridge Wells branch

The Maidstone and Tunbridge Wells branch setup its branch Facebook group as a way of keeping in touch with members. The group is used to publicise upcoming branch meetings and events, in addition to circulating feedback from the branch meetings and to advertise vacant branch officer positions. As well as using Facebook to communicate with its members, the branch meets up regularly and sends out correspondence through email and by sending letters.

Haywards Heath and Brighton branch

The Haywards Heath and Brighton branch set up its branch Facebook group as a way of keeping in touch with members. The group is used to share relevant articles and news, as well as publicising upcoming branch meetings and events. In addition to using Facebook to communicate with its members, the branch meets up regularly and sends out correspondence through email.

Luton branch

The Luton RCM branch set up its branch Facebook group as a way of keeping in touch with members. The page is used to publicise upcoming branch meetings and events, in addition to sharing relevant i-learn courses, reading materials, videos and the latest RCM news. In addition to using Facebook to communicate with its members, the branch meets up regularly and sends out correspondence through email.

Preparing the branch Facebook group

The decision to form a branch Facebook group should be taken at a formal meeting of the branch and participation should be entirely voluntary for each member.

The branch should consider appointing at least two administrators from among their membership to create and manage the Facebook page.

Each participating member should be advised to consider whether they wish to open a separate Facebook account for professional purposes through which they would then participate in the group page. If a member has a lot of personal, family or private material on their existing page, it may be advisable to form a separate professional account to keep that information safe.

The administrators should make contact with branch members to invite them to join the group, if you are unsure of who your members are this can be requested via email from membership@rcm.org.uk.

Midwives should be mindful of the obligations placed on them by the NMC code trust policy with regard to use of social media.

Seven steps to creating a branch Facebook group

1: Log in to Facebook

Log in to your Facebook account. You can create an account if you don't have one, but it may be best that someone with prior knowledge of Facebook sets up the branch Facebook group.

2: Choose your group name

It is important to choose a group name that is distinctive and cannot be confused with other group pages. If there is another group with the same or very similar name, this could be a source of confusion for the membership. Using the search bar at the top of your home or profilepage, search some key words to check that your proposed group name, which should normally be your branch name has. For consistency the following format is advisable: RCM [formal branch name] Group. Once you are satisfied that you have the right group name, you are ready to create the group.

3: Create the group

Go to your home page. Select 'Group' under 'Create' on the bottom left hand side of the page. A box appears: 'Create new group'. Name your group in the first text box.

4: Invite members to join

Below the new group name, invite members by typing their name into the box provided. You can also copy and paste the internet address from the newly formed group page and email or text to members later to invite them to join the group. You only need two members to initially start the page. They could be the two administrators who can then invite new members as they start to build up the page.

5: Choose your privacy settings

The 'Closed group' setting is recommended. This means that members can find the Facebook group page that has been created but can only see its contents once they have been verified by an administrator. Note that by creating an 'Open group', anybody on Facebook will be allowed to see posts and join the group. A 'Secret group' means that only those invited will see the group, including all its members and posts. **Note that Facebook privacy settings often change so do ensure that administrators are aware of any changes that take place on the site.**

You can also tick the 'Create shortcut' box so that there is a direct link created from your home page.

6: Click 'Create'

Once you have completed steps 1-5, click 'Create' and you have formed the group page.

7: Start populating your page

- You can now personalise your group, by giving it a cover photo at the top by clicking on the 'Choose' or 'Upload photo' icons. A good image to use could be the RCM branch logo if you have one. RCM logos are also available to download at www.bit.ly/RCMBranches.
- Describe your group by clicking on the 'About' menu item on the left hand side of the page. The group admin will be able to edit 'Add a description' You may wish to consider the following form of words: *"This is a group for RCM members, workplace representatives, branch officers and MSW advocates of the RCM [formal name] branch.*
  We aim to:
  1. *Promote the voice of midwifery.*
  2. *Provide local focus for trade union and professional activities.*
  3. *Enable members to meet together for professional, educational and social purposes.*

  Our group is a space where we can share news, events and communication from the RCM, and you can get involved in our branch activities. You're welcome to share to the group too, but please be mindful of confidentiality issues and safe use of social media when posting."
- You can now make posts, add documents or photos, set up member polls and various other actions using the 'Write post' box underneath the page cover photo.
- To invite additional members to join your group, click on the 'Members' tab on the right, then type in the person's name in the search bar provided and click on 'Add people'.

- You can also create a timed event, such as a branch meeting or workplace engagement. To publicise a branch event, click on the 'Events' tab, then click on the 'Create event' icon and fill in the relevant fields as directed and click on 'Create'.

Your group is now available for members to join and interact with the local RCM branch. Any members wanting to join will require the admin to accept their request (they will receive a notification of any new requests). Do ensure that if the group administrators leave the RCM branch that another member is sought to continue managing the page.

Top tips for using Facebook safely

- It is best not to mix personal friends and work colleagues in your Facebook account.
- Don't write anything on Facebook that is embarrassing or potentially damaging to your professional reputation, as employers may take disciplinary action.
- Consider having a separate professional account to participate in the branch Facebook group.
- Be particularly vigilant of what you say in your closed Facebook group and ensure you always follow your employer and NMC guidelines on the use of social media.
- Also be vigilant that your Facebook friends don't write offensive comments on your wall or tag you in a compromising photo, as this too may lead to disciplinary action from your employer.
- Facebook is a very public forum. Although messages are sent from personal accounts, do not be fooled into thinking it is like a text message that can only be seen by the person you are sending it to. Facebook messages can be used as evidence in a court of law. Be careful with what you commit to saying. Silence can be as loud as words, there may be times where not responding could serve you well, or you may wish to take the conversation outside of social media.
- If you want to limit arguments and attacks, avoid making statements and/or comments that are emotive to certain individuals and groups, avoid negativity and keep remarks positive or neutral. Never deliberately provoke an argument on Facebook even though you may feel frustrated or angry with a post, comment or Facebook status.

Privacy settings

Privacy is important, make sure you know who has access to view your information, but also you should publish only the activities you want your members to see.

If you don't want people to know your exact birthday, leave out the year. If you don't want people to know your phone number, don't provide it or make sure it is only shared with your friends.

Facebook's privacy features are always changing, so to try to keep up with the changes at www.facebook.com/help/?helpref=hc_global_nav.

Handling negativity on Facebook

If you receive some negativity on Facebook, you may want to consider respectfully closing down the exchange. These are a few reasons why you should do this:

- Facebook is not the correct forum to air any opinions, views or statements about a serious topic such as workplace matters
- do not reply to a conversation or debate on Facebook, unless you want to be completely involved. Remember, arguments on social media may last a long time and may snowball into something bigger as more people become involved
- if inappropriate posts are made, they can be deleted by the administrator, or the author can be signposted politely to take this up with the appropriate person or referred to RCM Connect 0300 303 0444

If you experience harassment/trolling on a regular basis, you may wish to report the offending messages to Facebook, so it can be removed and blocked from publication and action taken against the author.

To do this on Facebook, click on 'Report post' and choose the reason why you are reporting the message. Harassment is a criminal offence and if it persists, legal action can be sought.

For further guidance on social media use, refer to the RCM i-learn course Social Media – Do's & Don'ts. Your RCM organiser can also come to your workplace to deliver a workshop on using social media safely and the professional benefits of using it.

Appendix 6: Holding virtual meetings for greater member engagement

In an age where our lives are busier than ever and where social media is taking the lead for lines of communication, you can get creative with how you engage with members.

A measure of how branch members participate with the local RCM should no longer be about how many people attend meetings; it is about getting your message out and encouraging participation remotely where possible.

A great way to do this is via Facebook live streaming, which is simple to set up and very effective at encouraging people to be involved. Members can watch live streamed meetings from the comfort of their own sofa or anywhere in the world. They can also participate by commenting on the live stream to which the branch chair can monitor and respond or feedback to the meeting itself. Facebook live is not the only social site to offer this, but it is by far the most widely used and accessible to people.

If you are holding an AGM or conducting formal RCM elections, you will still need to have a least five members present to be quorate for the purposes of branch resolutions or elections.

Live streaming your meeting doesn't only apply to branch meetings, but can also be used to allow members to participate in workplace meetings, events or workshops.

What will you need?

- A good wifi connection (or if available a wired connection if using a laptop) or a heavy-use mobile data plan to stream the meeting (using live video eats a lot of data so be mindful of your plan allowance).
- A mobile, laptop or tablet.
- A second device which can be monitored by the chairperson for comments and feedback from members.
- A good private meeting space, with bright lighting and where possible not too much echo.
- A chairperson who is willing to manage the meeting effectively and understands the technology being used.

Top tips for live streaming your meeting:

- Do a test run to check the wifi/data connection and whether the lighting and sound in the meeting room works well for live viewers (if using mobile data you will need a very good data allowance as video streaming uses a lot of MBs).
- Make sure the devices are fully charged up before the meeting commences.
- When you're live, there's about a 30-second delay between your recording and what your viewers see. So if you ask for responses, there will be that delay to consider.
- Have whatever device you're using to stream video with (phone/tablet/laptop) set up in front of you at the end of the table, and make sure you have another device near you watching the live feed, so that you can see comments clearer.
- Be prepared for virtual attendees to drop in and out during the meeting.
- Only live stream with your closed RCM group, do not do this publicly outside of the group (the stream must be activated from the branch group page).
- Always set up the meeting as a timed Facebook event. Members will then know when to tune in and can indicate virtual attendance beforehand.
- Share your agenda and put all your big voting parts nearer the beginning so you capture the most people, as your viewers will jump in and out.
- You can publish the live feed after the meeting to your group. When this is posted, make a comment that it was recorded earlier and is not live now, as you could have people watch it later thinking it's live and try commenting.
- Ask your members for their feedback on how it went so that any issues with virtual attendance can be resolved.

Case studies:

Powys branch

For an RCM branch with small activity over previous years we really wanted to make an effort to become more active. The health board employs 39 midwives, not including our management team and others within the health board that are RCM members. So, with more than 40 members and Powys being a vast county spanning over 2000 square miles, attendance due to travelling to meetings and juggling workloads was a massive task. After hearing about the virtual meetings being held in England we decided to give it a go ourselves. Our RCM branch AGM was held earlier in the year and we thought it was the perfect opportunity to trial it.

We had five members in attendance at our meeting and three more viewed the live stream on Facebook, making our overall attendance eight. This was an achievement in itself. However, since then our post has had over 20 views, with RCM members commenting as well. I think it's safe to say that our first attempt at a live stream of our workplace representative meetings was an experience with hiccups and lessons learnt along the way.

But isn't that what we strive for – reflective learning? There will be more live streams to come and we are planning to use the guidance that the RCM has recently produced. And there are so many ways that we as a branch can use social media to engage with our members, so watch this space.

Worthing branch

Worthing has used Facebook live for its AGM meeting, which, as well as those physically attending, an additional 60 members viewed during the meeting and were able to comment and feedback on the agenda.

East Sussex branch

East Sussex holds its branch meeting across sites using the trust's video conferencing facility which is effective for branches with multiple workplaces to give members the best opportunity to be involved.

If you need any support in setting up and using the technology do speak to your RCM organiser or regional/national officer for advice.

Appendix 7: General Data Protection Regulations (GDPR) guidance

The GDPR regulations came into force on 25 May 2018 and cover the types of data that can be stored and shared, how this data is collected and how long the data can be retained.

These regulations replace the Data Protection Act 1998 and introduce tougher fines for non-compliance and breaches. They also give people more say over what companies can do with their personal data.

While the new regulations may appear onerous it must be acknowledged that as NHS workers, RCM activists will already have the knowledge, skills and experience in keeping client data safe. This responsibility is easily transferable to your RCM activist role.

What is personal data?

The GDPR covers personal data about an identifiable, living person.

It also includes data that could reasonably be put together with other information to find something out about a person, or information that could make it possible for a person to be uniquely singled out in a group of people. Some personal data is considered to be more sensitive than others. The GDPR calls these 'sensitive personal data'.

Any data about children under the age of 16 requires special protection, as they are particularly vulnerable and may not understand the risks involved in giving out their personal data.

Personal data versus sensitive data

Did you know that being a member of a trade union is classified as 'sensitive' personal data?

For RCM members this means the fact that they are a member of the RCM must not be revealed without explicit consent. The new regulations differentiate between personal as opposed to sensitive data and the following list provides some examples of this:

Personal data	Sensitive personal data
Home address	Ethnic origin
Email address	Religion
Date of birth	Sexual orientation
Telephone number	Gender
Photographic ID	Genetic data
IP address	Biometric data
National Insurance number	Health data
Education information	Race
Passport number	Bank details
Payroll information	DBS (Disclosure and Barring Service) information
Employment history	Political views

What rights do individuals have?

Everyone has the following rights under the GDPR.

Right to be informed

This provides the right for individuals to have information on everything that you intend to do with the data, for example, why it is needed, where it will be stored, who will have access. This also gives individuals the right to withdraw consent and the right to complain.

Right of access

Individuals have the right to be provided with the personal information held on them. They can write to organisations to request a copy of all the data held. Organisations are legally required to provide this within one month of the request.

Right to rectification

Any mistakes in the data held about an individual must be corrected within one month of the request. If the data has been passed to a third party, they must be informed of the rectification and the individual must be informed of the organisations with which the data has been shared.

Right to erasure

The right to erasure is also known as the right to be forgotten. Individuals have the right to have all the data held on them deleted in certain circumstances, for example,, if holding their data is no longer necessary, no longer relevant or if they withdraw consent.

Right to restrict processing

This gives individuals the right to prevent you from processing their data. You can store it but you cannot do anything with it.

Right to data portability

An individual may ask you to provide the data so that it can be transferred, for example, to another organisation. This has to be provided in an electronic format.

Right to object

Individuals have the right to object to their data being used to sell them things, for example, by email or cold calling. They also have the right to object to the use of their data in historical research or statistics.

Rights in relation to automated decision making and profiling

Individuals have the right to state that they do not want automated decisions made about them, for example, computer-generated decisions on loan applications. They have to be offered the chance to have the decision considered by a human.

Why are the GDPR relevant to you?

Branch officers, workplace representatives and MSW advocates who access and use information about RCM members are considered to be data processors under the GDPR. As a data processor you are required to comply with the data protection processes specified in the regulations.

Briefly, there are six main principles:

1. **Fair and transparent**
   Everything that is done with personal data has to be done lawfully, fairly and transparently. This includes ways in which it is collected, held, retrieved, organised and destroyed.

2. **How data is used**
   Once you have the data you can only use it for its original purpose. If it is to be used in different ways, then you need to get consent for this.

3. **Relevance**
   You can only ask for information that is relevant to the reason for which it is being collected. You cannot ask for information that might just be useful in the future.

4. **Accuracy**
   Reasonable steps must be taken to ensure accuracy of data. For example, names, addresses, dates of birth need to be recorded with absolute accuracy.

5. **Storage**
   Personal data should only be held for as long as it is needed. After that it must be deleted.

6. **Integrity and confidentiality**
   Personal data needs to be kept safe and secure, and needs to be protected from accidental or deliberate loss, destruction, damage or unauthorised access. You need to know how to keep data safe. For example:

   a. ensuring computer security including use of firewalls, passwords, backups, access and disposal of old computers
   b. shredding papers containing any personal information
   c. keeping personal information locked away

d. locking computer screens when you are away from your desk and ensuring that your screen is not visible by passers-by
e. not leaving laptops or files visible in cars
f. not discussing personal details with other people who don't have a right to know

What does this mean for you as an activist?

In practical day-to-day terms, activists need to bear in mind the following points to ensure member records are kept secure. As already mentioned, as an NHS worker you will have the knowledge, skills and experience in keeping data safe. Activists have the same responsibility to keep member data safe and secure.

Hard copy paper records

- Store paper records in locked drawer or filing cabinet.
- Keep papers out of sight – do not leave them lying around for others to view.
- If you need to take files away from a secure environment, ensure these stay with you at all times.
- Only keep case files for as long as the case is running. Once completed, you can hand the file to the member or ask your regional/national officer where to store it.
- Shred paper records when they are no longer needed.

Email

- Do not share your login details or password for your email account.
- Do not email files from work to an external email address.
- Always use bcc when sending a group email.

Digital records

- Password-protect electronic files if sending by email and send the password in a separate email or call the recipient with it.
- Don't store files on a shared computer/laptop unless they are password protected.
- Delete electronic files when they are no longer needed.

Computer security

- Never share your password or log another colleague into your Trust or Health Board systems using your own password.
- Ensure all computers and laptops are password protected.
- Regularly update software and anti-virus software.
- Do not store files on a shared computer/laptop unless they are password protected.

What to do if a data breach occurs

If a data breach does occur, you will need to take the following steps:

- contact the RCM either by emailing dataprotection@rcm.org.uk or calling RCM Connect on 0300 303 0444
- describe the nature of the personal data breach and what actions you have taken to address the breach

The RCM will contact The Information Commissioner's Office (ICO) within 72 hours of the breach.

10 top tips

The following are the key points for activists:

- anyone who uses or processes personal data has a responsibility to keep it safe
- the ICO is the supervisory authority for the UK. Any data breaches must be reported to them
- personal data under the GDPR is data about an identifiable, living person. This includes data that could be put together with other information to identify a person
- doing anything with data is considered processing, even just displaying a name on a computer screen. The GDPR protects all personal data
- remember, data protection is for you and about you and it is there to help uphold your rights and the rights of the people whose information you hold
- never send information from your work email to a personal email address
- always store hard copies of information securely either in a locked drawer or cupboard
- never share your password or log in a colleague under your credentials
- never leave personal files lying around at work, in your car or at home.
- always lock your phone/tablet or computer when you leave it

Appendix 8: Guidance on branch fundraising

All RCM branches undertaking fundraising activity should observe the following guidelines

Conduct of fundraising

1. Branch fundraising may be undertaken to;
   a. Support charities that are consistent with the aims and objectives of the RCM
   b. Assist members in pursuing their professional, educational and social interests (for example, attending the RCM annual conference or a collective learning fund)
2. All funds raised for a particular cause must be used for that particular cause. It may be necessary to open a separate bank account to facilitate this.
3. Branches should not undertake fundraising to support travel expenses for workplace representatives, for members to attend the branch AGM or in the pursuit of industrial action.
4. Branch treasurers have responsibility for ensuring that all branch fundraising is properly accounted for.
5. Branches must not engage in fundraising which:
   a. Is an unreasonable intrusion on a person's privacy
   b. Is unreasonably persistent
   c. Places undue pressure on a person to contribute
6. Branches should distinguish between fundraising:
   a. On behalf of [the RCM], which would only be in circumstances of a centrally directed campaign such as RCM Charity of the Year.
   b. In aid of [a charity or assisting members in pursuing their professional, educational and social interests], which is a choice of focus made independently by the RCM branch. Any beneficiary organisation should be made aware of the fundraising activity in advance
7. Branch fundraising communications should not contain:
   a. Content that is indecent or grossly offensive or that is intended to cause distress or anxiety. The use of potentially shocking images must be justifiable and give warnings of such material
   b. Misleading information by inaccuracy, ambiguity, exaggeration, omission or otherwise
   c. Material that may cause offence on the grounds of race, age, religion, sex, sexual orientation or disability
8. Branch fundraising communications should:
   a. Ensure that materials adhere to copyright laws: permission should be obtained from the rights holders for the use of images, logos, etc.
   b. Ensure literature includes legally required details of registered charity name, status, number and registered office where applicable
   c. Be clear about who the beneficiary(ies) of the fundraising will be
9. The RCM branch should not engage professional fundraisers.

Care of participants

10. Branches must take care not to denigrate other individuals or organisations or exaggerate facts relating to the potential beneficiary. Anyone contributing money should be able to make an informed decision.
11. Branches must take into account the needs of any potential contributor who may be in a vulnerable circumstance or require additional care and support to make an informed decision.
12. Branches should take all appropriate steps to ensure the health and safety of everyone participating in fundraising including members, other members of staff, service users and children.
13. Branches should observe the General Data Protection Regulations and observe the RCM's statement on GDPR (see Appendix 7).
14. Branches should observe the RCM's policy on equal opportunities and diversity with regard to participating in fundraising activity unless there are sound ethical or necessary reasons for doing so.

15. Branches must comply with legal duties concerning the use of the Disclosure and Barring Service (DBS), Disclosure Scotland or Access NI checks.

16. Fundraising activity is subject to the investigatory powers placed in RCM branch officers and regional officials, particularly where there may be concerns of impropriety with regard to use of funds raised.

Fundraising methods

17. When identifying a suitable venue/location for an event RCM branches must:

    a. Consider issues of equal access for all
    b. Ensure the venue complies with legal requirements about health and safety
    c. Ensure the venue/location is fit for purpose, taking note of any restrictions
    d. Be able to justify any environmental impact the event may have

18. The RCM branch must ensure that any required permissions or licenses for events are obtained from the local authority or other relevant bodies. If you are fundraising on Trust, Health Board or employer property, ensure to gain the relevant permission and that they are aware of the designated beneficiary for the fundraising.

19. Sponsorship forms must be clear about whether sponsorship money is given subject to any conditions (for example, that the participant will complete a marathon). If money is given on this basis and a sponsored event is cancelled, or a participant is unable or unwilling to take part or complete the event for any reason, the participant must contact donors and ask if they are still happy for sponsorship monies to go the organisation. If not, the donation must be refunded to the relevant donors. If sponsorship money is given without conditions, it automatically belongs to the relevant charity regardless of whether or not an activity is completed.

20. Branches must follow the enclosed guidelines on lotteries to keep within the 'small society' exemptions from licensing requirements in the Gambling Act 2005.

    a. None of the sums raised should be used for private gain
    b. Tickets for lotteries should only be sold during the event on the premises where the event is held
    c. The draw must take place during the event
    d. The draw should not rollover
    e. Deductions from the profits going to good causes must not exceed £100 in costs and £500 in prizes

21. Where the participant does not personally pay the whole cost of a trip (for example, an international midwifery project), but uses some of the sponsorship money for this purpose, this must be made clear to every donor.

22. Fundraising via challenge events should be compliant with travel legislation including the Package Travel, Package Holidays and Package Tours Regulations 1992 and the Civil Aviation Air Travel Organisers' Licensing Regulations 2012, with particular attention to:

    a. Checking the track record and reliability of the tour operator and any sub-contractors
    b. Compliance with data protection law

Appendix 9: Advice to RCM branches on responding to funding requests from members

The RCM encourages RCM branches to support the educational and/or professional activity of its members. This could include the purchase of course books or attendance at a conference or study day.

The process for considering member requests for funding support

It is good practice for all RCM branches to have a transparent process to follow when responding to requests for funding. The decision on how a branch allocates its funds is a branch matter but the process should be agreed and transparent. The RCM advises that the following should be considered when developing the branch process:

1. All branch members are entitled to apply for funding.
2. A request for funding does not automatically mean that funding will be given.
3. A request for funding may be fully or partially given.
4. All requests must be made in writing to the chair and members of the branch committee, and be submitted in good time. If the request is to support attendance at a conference or study day the request should be received at least four weeks before the event.
5. Decisions on funding requests must be made and the member informed within four weeks of the request being made.
6. When funding is agreed, reimbursement of monies will only be on the presentation of valid receipts.
7. This policy should be made available to all members within the branch so that they are aware of the process to be followed.

It is for the branch to determine the timelines for funding submission and informing the member of the decision. Branches may wish to give a deadline dependent on what the event is and how quickly they can consider the request.

A member can appeal to the RCM Branch Governance Committee if they feel that the process has been unfair. The committee will consider the transparency and fairness of the decision-making process but will not comment on how much funding was or wasn't allocated.

Considerations for the branch

It is the responsibility of the branch to decide whether funding should be given and how much. The branch committee will be responsible for making branch members aware of the process for making a funding request, receiving a request and reaching a decision on the request.

This decision should normally be made at a branch meeting but can be made virtually if this is not possible, for example, by setting up an online ballot.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