



## BALLOT GUIDELINES FOR GENERAL SECRETARY ELECTION 2021

### Contents

INTRODUCTION .....	2
TIMETABLE FOR THE BALLOT .....	2
CANDIDATES .....	3
NOMINATIONS .....	3
<i>Making a nomination</i> .....	4
<i>Workplaces with more than 50 members</i> .....	4
<i>Communications with members in connection with an election</i> .....	5
CAMPAIGNING .....	6
<i>Financing a campaign</i> .....	6
<i>Conduct of Candidates</i> .....	7
VOTING .....	8
COUNT AND DECLARATION .....	9
SAMPLE BRANCH MEETING NOTICE – this is to be amended.....	10
CONTACT INFORMATION .....	11
Text of Rules 5.2 and 27.1.....	11
Guidance on holding a virtual branch meeting – Appendix 1.....	13
Using Social Media – Unite Guidelines - Appendix 2. ....	18

## INTRODUCTION

The General Secretary is responsible for the Administration of the Union, their powers and responsibilities are set out in Rule 15. The election for the General Secretary is conducted by the Executive Council in accordance with Rule 16. The following guidelines for this election are intended to ensure it conforms to law and the union's rule book, and to indicate what candidates and their supporters can and cannot do. It is aimed to ensure an open, fair and democratic process. The ballot guidelines were agreed by the Executive Council on 14<sup>th</sup> April 2021 and all candidates are bound by them from that date.

- 1) The union is required by law to have an Independent Scrutineer responsible for conducting the ballot and ensuring its conformity with legislation. This is *Civica Election Services* (CES) at 33 Clarendon Road, London N8 0WW. The Union's rules also provide for an Independent Returning Officer responsible for the administration of the election and for an independent Election Commissioner to adjudicate on complaints by candidates or the Executive Council. For this election Simon Hearn of CES is acting as the Independent Returning Officer and Lord John Hendy QC and Baroness Christine Blower are acting as joint Independent Election Commissioners. Contact information for both the Returning Officer and the Independent Election Commissioner can be found on page 11.
- 2) All eligible members of the union may vote in this election *except* those who join after 14 April 2021. Eligibility includes Retired Members+ and Community members.
- 3) Notice of the ballot and other details will be sent to the appropriate Unite branches in the letter inviting nominations. The timetable for the election is set out below.

## TIMETABLE FOR THE BALLOT

Ballot Rules and Guidelines for the conduct of the election agreed by Executive Council	14 April
Send invitation to submit pre-nomination campaign statement from people seeking nomination to branches	16 April
Deadline for receipt of pre-nomination campaign statements	26 April
Despatch of Nomination Pack to branches. Election website live including campaign statement from people seeking nomination.	30 April
Nominations Period	6 May to 7 June
Eligibility to Vote cut off for members (must be a member on this date plus 13 week rule)	14 April
Executive Council meeting	7 – 11 June
Last date for Receipt of Nominations midday	9 June
Last date for Acceptance and Receipt of Election Address midday	10 June
Voting Papers Despatched from	5 July
Helpline for members who have not received their ballot paper opens	6 August
Deadline for despatching duplicate ballot papers	19 August

Deadline for Voting papers to be returned to the Independent Scrutineer - midday	23 August
Count and scrutiny of ballot papers by CES attended by observers	24 & 25 August
Executive Council receive report of Independent Scrutineer and result declared	26 August
Executive Council Meeting	6 – 10 September

## **CANDIDATES**

- 4) To stand in this election a candidate must be eligible to vote in the election and as covered by rule 16.6 and 16.13:
  - have at least 5 years continuous membership of the union.
  - must receive nominations from at least 5% of the total number of branches in Unite. There are currently 3,474 of branches as defined for the purposes of this election (see paragraphs 14 – 17). To become a candidate, a nominee must therefore receive at least 174 branch nominations subject to a final reconciliation of eligible workplaces. Any variation on this number will be advised to candidates in advance of the opening of the nomination period. This total must include nominations from branches from more than 2 regions. Nominees will be notified of branches nominating them and subsequently will be sent updates no less frequently than twice weekly.
  
- 5) Prior to the nomination period for candidature opening, branches will be notified that they may advise any eligible member of the branch who wishes to become a candidate in this election that they should notify the Returning Officer of that fact and supply the administration with a statement of intent of no more than 150 words together with their membership and contact details. This statement and details will be circulated by the union when inviting branch nominations. The statements of intent are published at the union’s discretion (unlike the election address of each person who qualifies as a candidate which are sent to members along with the ballot paper and for the content of which Unite bears legal responsibility)., Unite therefore reserves the right to edit these statements of intent, if necessary to ensure that they correspond to the guidelines for candidates conduct as set out in paragraph 36 below and the Union’s legal obligations.
  
- 6) Any member who is seeking nomination or becomes a candidate in this election is bound by the rules covering this election and by this guidance issued by the Executive Council. A candidate becomes a candidate for the purposes of these guidelines at the point their candidacy is publicly declared.
  
- 7) Once a branch has nominated a nominee it can liaise with its members to advise them of the nomination.

## **NOMINATIONS**

- 8) Nominations may only be made by branches, including Retired Member and Community Member branches. Branches will be sent a nomination form which will also be available online. Nominations can only be made at a meeting properly convened for that purpose during the nominating period.

### ***Making a nomination***

- 9) At the time of issuing these rules and guidelines, we are in the middle of the Covid-19 pandemic and the normal arrangements for branch meetings held in person may not be feasible. During this unusual period branches may hold their nomination meeting in a virtual format and they should utilise whichever method best suits their members' circumstances. Such meetings may be by video conference facilities. The Executive Council have issued guidance on how to hold a virtual branch meeting, this is attached as appendix 1.
- 10) Where branches are able to hold a normal in person branch meeting they need not give special notice of the meeting if the details of their branch meetings are set out at least seven days ahead on the membership system (available to members on the My Account section of the website). Otherwise at least seven days' notice of the meeting must be given, and it must be clearly stated that the General Secretary Nomination will be considered at the meeting.
- 11) When it is necessary to issue a notice of meetings this must be made available to the Returning Officer when nominations are submitted, or on request. A sample notice of meeting which can be used for this purpose is included here for convenience, see page 10
- 12) When holding a branch meeting to make a nomination it should be noted that:
  - Each eligible branch may make only one nomination.
  - At least five members eligible to vote must be in attendance at the Branch meeting.
  - The secretary may not also act as chair of the meeting.
- 13) Nomination forms will be sent to branches by post and will be available online. They must be completed in full by the appropriate branch officers. Failure to do so will result in the Returning Officer declining to accept a nomination.

### ***Workplaces with more than 50 members***

- 14) Workplaces with more than 50 members that are not constituted as an existing workplace branch will be classified as such for the purpose of making nominations for this election only.
- 15) To implement the requirement in rule to treat any workplace with more than 50 members, which is not in an existing workplace branch, as a branch for the purpose of making a nomination in an election for General Secretary the following definition of what does and does not constitute a workplace branch has been used.
- 16) Existing workplace branches are those that have members as set out below:
  - with a single employer on a single site;
  - based on a single site which may include more than one employer e.g. a regional airport;
  - with a single employer which may have several sites e.g. a local council or NHS trust;
  - in a national branch.

Workplaces within such branches therefore do not have additional nominating rights.

- 17) Branches based on membership in a geographical area or an industrial sector are not workplace branches. By their description they include several workplaces and each separate workplace within these branches with 50 or more members will be eligible to be defined as a branch for the purposes of making a nomination.

- 18) Any dispute about what constitutes a workplace eligible to make a nomination under rule should be raised with the Chief of Staff. The Chair of the Executive Council and the Chief of Staff will make any decisions required in this regard.
- 19) A list of workplaces in this category has been prepared by the Constitutional Administration department and has been provided to the Returning Officer, the Executive Council, candidates and regions.
- 20) Nomination papers for any workplace in this category will be sent to the secretary of the branch to which the workplace is allocated. It will be the responsibility of such branch secretaries to ensure that the relevant workplaces are advised that they can make a nomination and assist them in setting up a meeting to do so in accordance with these guidelines. Only a properly elected workplace representative (as defined in Rule 6) in such a workplace may call a meeting to make a nomination.
- 21) Workplaces in this category may make a nomination at a properly convened workplace meeting by a notice giving members at least 7 days' notice of the meeting and stating that the purpose of the meeting is to make a nomination in this election.
- 22) The notice convening the meeting along with minutes of the meeting, stating who was in attendance, must be made available to the returning officer when submitting the nomination. A sample notice is available on page 10 this may be adapted as required.
- 23) The rules about branch meetings in this Guidance apply to branches treated as a workplace branch for the purpose a making a nomination. Thus, at least five members from the relevant workplace who are eligible to vote must be in attendance at the meeting and the workplace representative acting as secretary for the meeting may not also act as chair of the meeting.
- 24) If such a workplace cannot hold a meeting in person they should refer to the guidance on holding a virtual branch meeting attached at appendix 1 – and seek the assistance of their branch secretary in setting this up.

***Communications with members in connection with an election***

- 25) At the close of nominations and before the despatch of ballot papers each candidate with sufficient nominations will be entitled to one communication by email to the membership at large. This will be despatched by the Returning Officer and will consist of an electoral communication of up to a maximum of 1,000 words. The electoral communications from all candidates will be sent in a single e-mail message. The electoral communications are published at the union's discretion (unlike the election address of each person who qualifies as a candidate which are sent to members along with the ballot paper and for the content of which Unite bears legal responsibility), Unite therefore reserves the right to edit these statements of intent, if necessary to ensure that they correspond to the guidelines for candidates conduct as set out in paragraph 36 below and the Union's legal obligations
- 26) No member (including branch and workplace representatives) or employee of Unite is allowed to release or permit the release in any form whatsoever to the candidates (or their supporters):
  - a. the details of individual members contained within the Union's membership system or
  - b. any list, register, email list, data base or other method of storage of members contact or home details

that is held either by Unite or held by a member by reason of their position as a Unite employee or representative (past or present). Such information is the property of Unite and any breach of this rule may result in disciplinary action and could be a breach of the law on data protection.

- 27) Candidates (or their campaign or supporting bodies) must ensure that (apart from the electoral address) no members should be written to, telephoned, emailed, texted or otherwise communicated with at their home or on private communication devices except where specific permission has been given to do so by a member who has opted to receive such communications – through conventional or social media. Records should be kept by the campaign of every such individual ‘opt-ins’ for independent verification if necessary by the returning officer. Any breach of this requirement to any extent may, after investigation, result in a candidate being debarred from the election.
- 28) All candidates with sufficient nominations who have confirmed in writing that they accept nomination will be invited to submit to the Returning Officer an election address of up to 600 words and a head and shoulders photo of themselves. Guidance, *which must be strictly adhered to*, concerning how this address should be completed will be contained on the Election Address Form sent to the candidates for this purpose. If the address contains more than 600 words, only the first 600 will be printed, apart from the photo mentioned above no illustrative or visual material may be included. All legal liability for the contents of each candidates’ election address rests solely and entirely with the candidate in question and not the union. A list of the branches and workplaces (treated as workplace branches for the purpose of this election) that nominated each candidate will be published with the election address circulated to members
- 29) The Executive Council reserves the right to append, as approved by the Returning Officer, a statement of clarification if the content of any election address makes this appropriate or necessary.

## **CAMPAIGNING**

### ***Financing a campaign***

- 30) It is important that Unite elections are not subject to undue influence by organisations, commercial or political, and individuals outside the union. It is therefore required that elections are financed exclusively from within the membership and branches of the union. Any breach of this requirement to any extent may, after investigation, result in a candidate being debarred from the election.
- 31) Accordingly, any candidate for General Secretary is required to keep accounts covering the entire period from the announcement of the election until the cessation of their candidacy, either at the conclusion of the election itself or the conclusion of the nominating period. Such accounts should set out clearly the source and amount of every donation, above £250, received by a candidate or on behalf of a candidate’s campaign and also itemise all expenditure by or on behalf of the candidate. The accounts should be available for inspection by the Election Commissioner, the Returning Officer or an officer or member designated by the Executive Council at any time. The accounts, including the identity of donors and recipients (other than the candidate), shall be regarded as confidential for all purposes other than to the extent required to ensure that the union’s Rules and Guidelines are or have been upheld.

- 32) No candidate shall accept any donation from any organisation external to the union, nor from any individual not a member of the union. The total amount to be expended on a campaign for the General Secretary election shall be capped at ten pence per member eligible to vote in said election (currently this amounts to £105,959). This shall cover money expended by the official campaign established by each candidate, and any other organisation or grouping within the union, either pre-existing or established for the purposes of the campaign. It does not cover endorsement from independent media, nor by *bona fide* independent organisations. The determination of what constitutes an independent organisation for these purposes shall rest with the Executive Council which may seek the advice of the returning officer.
- 33) The provision of services in kind by third parties shall be counted towards the expenditure limit, and should be accounted at their market value.
- 34) Donations may be solicited only from individual members of Unite and from branches of the union which have nominated the candidate concerned. Donations from individuals shall be capped at a maximum of £500, and those from branches at £5 per member in the nominating branch concerned. Workplaces may donate to the campaign of the nominated candidate on the same basis and use the funds of their branch to do so. Money spent by a branch in communicating to its own members in support of its nominated candidate does not count towards this limit. Any sums donated surplus to the spending limit for that campaign shall be returned to the union centrally upon completion of the election and placed in the Disputes Fund. Candidates should make this clear in all communications soliciting donations.
- 35) Apart from the guidance on finances set out above, no union funds or other resources, including employees' time while at work, may be used to support any candidate.

### ***Conduct of Candidates***

- 36) While campaigning in the election it is legitimate to criticise the procedures and policies of the union as an entity or the policies put forward by other candidates in their campaign. However, it is not permissible to make personal attacks on individual candidates or on employees of Unite. The provisions of Rule 27 remain in force in this respect and of agreed employee disciplinary procedures. (See rules 5.2 and 27.1 appended to these guidelines)
- 37) While it is recognised that the actions of any supporters of a particular candidate may be outside the control of that candidate, the candidate will be asked to publicly dissociate him/herself from any actions taken by their supporters in the campaign should they breach these guidelines in the opinion of the Executive Council, or the Returning Officer. Other candidates that may have been affected by such a breach should be consulted before a public repudiation is undertaken.
- 38) No candidate shall access the Unite database to contact members. Any candidate, or a supporter of any candidate, who has access to the Unite membership database, or any part thereof, in consequence of their employment may not access the database to enable contact with members in connection with the election.
- 39) The union's corporate identity or logo (or anything which in the opinion of the Returning Officer may be identified as such) may not be used in any material supporting any candidate. Unite's own social media platforms may not be used for election campaigning, this includes the use of an official Unite e-mail address i.e. ending @unitetheunion.org for sending e-mails except in so far as branches may use such an e-mail address when communicating to their own members as provided for in paragraph 7 above.

- 40) Concerning the display of material bearing the Unite logo in still photo or video format, where such material consists of still photos or film footage of a demonstration, picket or other Unite-organised public event, and where the still photo or video is clearly labelled as campaign material for an identified candidate for election, then such a display of Unite's brand identity shall not be considered a breach of these guidelines. For clarity, the static display or other use of the Unite logo (e.g. as backdrop for the candidate addressing the camera) in a still photo or video, or in footage of an event organised to support a candidate for election, is a breach of these guidelines.
- 41) No candidate shall email any Unite employee at their work email address in support of their campaign. No Unite employee should campaign or provide administration support using union facilities for any candidate.
- 42) A webpage will be provided by Unite for each candidate and more detailed guidance on the operation of such webpages will be provided when a nominee is confirmed as an eligible candidate. These will provide candidates with the ability to link to social media; websites or other media outside the bounds of the webpage. The union reserves the right not to transmit any links to content that is in breach of these guidelines.
- 43) If the Returning Officer or the Executive Council determines that a candidate or their campaign is in breach of any of the provisions of paragraphs 30 to 42 above, they may be disqualified from standing in the election. In these circumstances there will be no appeal. In any event, any candidate or their supporters who are found to be in breach of these provisions may be subject to disciplinary action under the rules of Unite and an employee who breaches these provisions may be subject to disciplinary action under their terms of employment.
- 44) All candidates and their campaign supporters should familiarise themselves with the provisions of the General Data Protection Regulations, 2018 details of which provisions will be made available to candidates once they are validly nominated and are available from the union administration at any time.

## **VOTING**

- 45) Eligibility to vote is as set out in paragraph 2 above. All eligible members will be sent the ballot papers and the election addresses by post together with a reply envelope. If they do not receive their ballot paper by the date specified in the timetable they should contact the Independent Scrutineer which will determine whether a replacement ballot paper should be sent.
- 46) Members must by law be allowed to vote free from interference or restraint imposed by other members or by employees of the union. For example, it is not permitted to encourage members to bring their ballot papers to a central point for posting, or to hold raffles or ballot days to encourage that. Such activity may lead to the partial or total invalidation of the ballot and lead to the disciplinary action under Rule 27.
- 47) It is the responsibility of the member to ensure that their ballot is returned to the Independent Scrutineer by the close of ballot.

## **COUNT AND DECLARATION**

- 48) The Independent Scrutineer is responsible for the count of the ballot. Depending on the Government guidelines in relation to Covid-19 restrictions in place at the close of the ballot the count may be held in person or it may take the form of virtual presentation. A candidate may attend and be accompanied or, if not attending, may be represented at the count by one person.
- 49) The Independent Scrutineer will provide the result to the Returning Officer and the Executive Council will issue a declaration of the result, which will be published on the union's website, and will inform all branches.
- 50) This Guidance is designed to assist members of Unite in understanding the conduct of this ballot, and to set down clear parameters for nominating and campaigning. It does not cover all the points set out in Rule, nor all the legal provisions governing the election. If there is any doubt or confusion on any point, please refer to the union administration ([elections@unitetheunion.org](mailto:elections@unitetheunion.org)) for information.

**SAMPLE BRANCH MEETING NOTICE – this is to be amended**

This notice should be amended to reflect your own branch meeting details and the nominations your branch is eligible to make. It should be distributed widely to members using the usual method of issuing a meeting notice.

*(Please refer to pages 3 to 6 of the ballot guidelines booklet and the letter inviting nominations to complete the sections left blank with the correct dates and constituency your branch is entitled to nominate for)*

Date:

To: All members of the {insert branch}

Len McCluskey having announced his retirement, it is necessary to hold an election in accordance with the Rules of Unite for the next General Secretary who will take up office on [insert date XXXXXXXX].

In accordance with the Trade Union and Labour Relations (Consolidation) Act 1992 Civica Election Services; have been appointed to act as Independent Scrutineer for this ballot. They can be contacted at the following address: The Independent Scrutineer, Civica Election Services, -Election Centre, 33 Clarendon Road, London N8 0NW.

Any prospective candidate must have at least 5 years membership of Unite.

Under the ballot rules our branch is required to hold a meeting during the nomination period *[please insert the correct dates]* in order to determine our nomination (if any) for the General Secretary election.

This meeting will take place on *[insert day and date between during the nomination period]* at *[insert time and venue]*.

Yours sincerely

{name}

Branch Secretary

## **CONTACT INFORMATION** – see paragraph 1 of the guidelines

In accordance with Rule 16 the Executive Council has appointed the following:

16(2) – CES (Civica Election Services Ltd) as independent scrutineer for this ballot they can be contacted

by post at The Election Centre, 33 Clarendon road, London N8 0NW;

by phone 020 8365 8909

by email: [support@cesvotes.com](mailto:support@cesvotes.com)

16(3) – Lord John Henty QC and Baroness Christine Blower as joint Election Commissioners. They can be contacted via the Constitutional Administration Department (see below);

16(4) – Simon Hearn CES (Civica Election Services Ltd) as independent Returning Officer. They can be contacted

By post as above

By phone as above

by e-mail: [returningofficer@civica.co.uk](mailto:returningofficer@civica.co.uk)

For any other queries about the conduct of the election or to reach the Unite Chief of Staff please contact the Constitutional Administration Department who administer this election by e-mail [elections@unitetheunion.org](mailto:elections@unitetheunion.org)

## **Text of Rules 5.2 and 27.1**

### **RULE 5. OBLIGATIONS OF MEMBERS**

5.2 A member must not knowingly, recklessly or in bad faith provide the Union with false or misleading information or malicious false complaints relating to a member including those holding lay office as accountable representatives of workers or employees of the Union or any aspect of the Union's activities.

### **RULE 27. MEMBERSHIP DISCIPLINE**

27.1 A member may be charged with:

27.1.1 Acting in a way contrary to the rules or any duty or obligation imposed on a member by or pursuant to these rules whether in his/her capacity as a member, a holder of lay office or a lay representative of the union or otherwise bringing the union into disrepute.

27.1.2 Being a party to any fraud on the Union or any misappropriation or misuse of its funds or property.

27.1.3 Knowingly, recklessly or in bad faith providing the Union with false or misleading information relating to a member or any other aspect of the Union's activities.

- 27.1.4 Inciting, espousing or practising discrimination or intolerance amongst members on grounds of race, ethnic origin, religion, age, gender, disability or sexual orientation.
- 27.1.5 Bringing about injury to or discredit upon the Union or any member of the Union including the undermining of the Union, branch or workplace organisation and individual workplace representatives or branch officers.
- 27.1.6 Obtaining membership of the Union by false statement material to their admission into the Union or any evasion in that regard.
- 27.1.7 Breach of the Union's policies on harassment, dignity and respect, which will include cyber bullying and harassment.

**Guidance on holding a virtual branch meeting – Appendix 1**  
**A leaflet containing these guidelines can be downloaded to print locally**  
**from the Unite General Secretary Election website**

**Holding your branch meeting online – advice for branch officers**

**There has been a huge growth in meetings online, for both work and personal events.**

Unite committees and branches have also been making use of the software that is out there to ensure that the business of the union can be conducted during this time of crisis, tiers, lockdown and profound upheaval.

The union's rules and standing orders governing the conduct of branch meetings were written with physical, in person, meetings in mind. Where branches can hold in person meetings in a Covid safe way with appropriate social distance and other measures in place they may continue to do so. But as Unite branches adapt by holding virtual meetings, this guidance has been produced to support you

This guidance is designed to ensure that you can adhere to the requirements placed on branches by the Unite rule book for passing motions, spending branch funds, making nominations etc when holding your online meetings.

**Virtual (aka online) meetings may take the form of a video conference all.**

**GETTING STARTED**

**What software should your branch use?**

Video conferencing software, such as Zoom or Microsoft Teams, is readily available and easy to install.

**Does your branch need special equipment?**

No, Zoom and Microsoft Teams can be run on your desktop computer, laptop, tablet or mobile phone. Any of these will need you to be connected to your Wi-Fi. Check that your speaker and camera work because you will need these to participate in the meeting.

**Notify members in advance**

You should contact members to ensure that they know that the meeting is upcoming. Make sure that you include the details needed to join the meeting, such as ID and password.

**Make use of MyAccount on the Unite membership system**

Many branches have a notice on the MyAccount section of the membership system showing when and where they meet.

The Branch Secretary should make sure that this notice is kept up to date. The date of the branch's virtual meeting should also be clear. The branch secretary should indicate that the meeting will be held in a virtual format and the date and time of the meeting should be indicated.

**TIPS ON SETTING UP YOUR MEETING**

- make sure that the time, date and format of the branch meeting is clear to all members – and can be easily found.

- Make sure to include a notice asking members to contact the branch secretary for details of how to join the meeting.
- Remember to include the branch secretary's e-mail address in the contact information for the branch
- **Post your meeting on the branch portal** – branch secretaries should ensure that their branch's meeting details are up to date by logging on to the branch portal <https://branch.unitehteunion.org>  
The screenshot below shows how the branch secretary can enter the information on the membership system using the branch portal:

**Schedule**

\* Day(s) ⓘ Third Tuesday of every other month

\* Time ⓘ 18:00

Meeting comment ⓘ At the moment all meetings will be virtual, please contact me at rose.keeping@unitehteunion.org to get joining instructions

Cancel Save

- **What if your branch doesn't use MyAccount?** If your branch does not post details of its meetings on the membership website then email members (or use your usual method of contact) with the arrangements for the meeting etc, when holding your online meeting.
- **IMPORTANT: Remember the GDPR rules when emailing members** Branch secretaries should always bear in mind GDPR issues around personal information when sending emails to branch members. You must use the BCC function to hide the names and e-mail addresses of members. If you fail to do this, members could complain about a data breach.

### Keep members' email and contact details up to date

Make sure that your members keep their contact details, including e-mail addresses, up to date using the MyAccount facility on the website. You can also update a member's e-mail address using the Branch Portal. E-mail distribution lists should always be taken direct from the branch information available using the Branch Portal, to ensure that you always use the most up to date data available.

### If you don't have a member's e-mail address....

Your branch may also write to members by post giving details of the virtual branch meeting, time, date, format and how to get joining details from the secretary. Your regional administration will be able to assist with this task. The cost of such mailings will be deducted from the branch administration allowance

### What about using social media to notify members?

Branches may also advertise their meetings on social media or on their branch website. Branch secretaries should ensure that only the date and time of the meeting are advertised. Joining instructions should not be circulated on general social media outlets or websites, a member should contact the branch secretary to receive these.

**Joining instructions are for branch members ONLY**

The branch secretary should ensure that the joining instructions for a meeting are only sent to bona fide branch members. They can then check membership details on Stratum, if necessary.

**Keep an attendance list**

When admitting members to a meeting, the secretary should ensure that they keep a list of those in attendance for the minutes of the meeting in the same way that they would for an in person meeting.

**Get the agenda ready – and circulate it in advance**

When the branch secretary is notifying members of the meeting it is recommended that they list agenda items for discussion and request that members raise any other items they wish to consider prior to the meeting.

The branch secretary and the branch chair should agree the final agenda which should be sent with the joining instructions. The agenda for the meeting should not be posted on social media or websites.

**RUNNING A SUCCESSFUL ONLINE MEETING****At the meeting**

The branch secretary and Chair should work closely together, as usual, to make sure that the meeting runs in an orderly fashion.

The chair should run the meeting in the way that they would an in-person meeting, calling people to speak, keeping order, and taking votes etc.

**The mute button is the meeting's friend**

People should be muted when they are not speaking. There should be no speaking over other people.

**Who is the Host?**

On Zoom the person setting up the meeting is called the Host. This person may chair the meeting, but for a branch meeting it is better that the secretary is the Host.

The secretary can make the Chair a co-host, but as Host the secretary will have more control over the virtual part of the meeting.

**What is the Waiting Room?**

When setting up the meeting the branch secretary (Host) should make sure that there is a waiting room facility for similar for the meeting. This will allow them to verify that people seeking to join the meeting are branch members and to keep a note of who joins for minuting purposes.

For larger meetings, the secretary may need another person (e.g. a branch committee member) to assist them in ensuring that people are admitted and noted in an efficient way.

**Do you need a Minute Secretary?**

The branch should also consider whether they need a minute secretary to support the branch secretary in capturing the decisions of the meeting including voting records.

**Make sure all names are displayed**

Each person in attendance at the meeting should have their correct name displayed for identification purposes. The secretary may advise someone to amend the name showing on screen or they may do this for them.

Members intending to join the meeting by smart phone should give the number of the branch secretary to allow them to be identified when they see access to the meeting. Their number should be replaced by their proper name.

**Quorum still stands**

The requirement for a minimum of 5 members in attendance to make a quorum is not varied for virtual meetings.

**Voters must be seen – and votes must be verified**

It is common practice in video meeting calls for people in attendance to turn off their video, e.g. if they have a poor Wi-Fi signal.

However, when taking a vote the Chair should ensure that all members voting can be seen and have their video turned on to verify that the meeting remains quorate.

If the member cannot turn on their video they should verbally confirm that they are still in the meeting.

If the chair is uncertain whether a member is actually on the call when a vote is taken they should speak to them to verify the position.

For larger meetings, there is a voting facility on Zoom which allows those in attendance to indicate yes, no or abstain, providing an instantaneous count.

**Keep it confidential**

Members attending a branch meeting in a virtual format should treat it as if it is an in-person meeting. The usual requirements to respect others in attendance and to keep the confidentiality and integrity of the meeting remain in place.

**Help is on hand**

Where a branch secretary does not have suitable IT equipment to set up such a meeting or does not have a Wi-Fi connection, the branch fund may be used to support them. That could mean assisting in the provision of a laptop or table, webcam, headphones or Wi-Fi connection. Unite can purchase a laptop for the branch at a discount. The cost would be deducted from the branch fund.

Where a branch has insufficient funds to assist then the branch may apply to their region for financial assistance. The cost of this regional support would be set against branch funds.

**Zoom discount available**

Unite can provide a substantially discounted subscription to Zoom to any branch that would like to set one up to conduct virtual branch meetings.

The operation of such accounts is subject to Unite policies. The charge for such an account will be deducted from the branch fund.

**Help with a branch website**

Any branch that wants to set up a branch website should contact the ICT helpdesk or their Regional Digital Assistant for further details.

**Contact Unite ICT helpdesk for information on discounts available on email: [icthelpdesk@unitetheunion.org](mailto:icthelpdesk@unitetheunion.org) or call: 02033712100**

**No cost for meetings**

The branch should not be responsible for any cost incurred by individual members for joining a virtual meeting.

**Your region can help**

Regional administrations should be available to assist in showing a branch how to set up a meeting. Zoom training for branch secretaries and Chairs will be available as is practicable. Details will be available from Regional Education Officers or your Regional Digital Assistant.

**USEFUL RESOURCES**

**Unite has produced a number of digital guides that will help branches in setting up a meeting. These are available on Vimeo and YouTube:**

**On Vimeo:**

Setting up a video call <a href="https://vimeo.com/486858075">https://vimeo.com/486858075</a>	How to use Zoom <a href="https://vimeo.com/486848140">https://vimeo.com/486848140</a>
Video call etiquette <a href="https://vimeo.com/486854744">https://vimeo.com/486854744</a>	How to use WhatsApp <a href="https://vimeo.com/486861243">https://vimeo.com/486861243</a>

**And on YouTube:**

**The guides are in a playlist on YouTube so you only need to do one click and the videos are in one place together.**

Playlist link: [https://youtube.com/playlist?list=PL\\_CA8fbghqrKTw4-yYK9ZhGJMAWvOFixw](https://youtube.com/playlist?list=PL_CA8fbghqrKTw4-yYK9ZhGJMAWvOFixw)

**If anyone wants the individual links:**

How to use Zoom - <a href="https://youtu.be/73lUQozfdWs">https://youtu.be/73lUQozfdWs</a>	Setting up a video call - <a href="https://youtu.be/unTweB1v3m0">https://youtu.be/unTweB1v3m0</a>
Video call etiquette - <a href="https://youtu.be/tVJtYieNdg">https://youtu.be/tVJtYieNdg</a>	How to use WhatsApp - <a href="https://youtu.be/ryBJoRI3OSg">https://youtu.be/ryBJoRI3OSg</a>

- Unite’s harassment policy also applies to virtual meetings and branches must ensure the of security of participants in terms of screen sharing, recording, preventing bullying, harassment and discrimination
- Unite’s commitment to supporting disabled members’ access to meetings also applies to virtual meetings please contact your regional administration if you require further information
- Unite guidance on timing of meetings to maximise attendance and equality also applies to virtual meetings

**If you require further advice on the Branch Portal please contact your Regional Office.**

## **Using Social Media – Unite Guidelines - Appendix 2.**

**A leaflet containing these guidelines can be downloaded to print locally from the Unite General Secretary Election website**

### **Using social media**

#### **Guidelines for Unite reps, organisers and officers**

- Digital media is now a fixture in people’s lives. Billions of people use many different social media platforms, including Facebook, Twitter, Instagram and Pinterest, and messaging services such as WhatsApp, and the numbers increase by the day.
- Used well and responsibly, social media, including blogs, vlogs and websites are effective ways for Unite to reach people and to promote the union’s policies and campaigns. This is more true than ever as a result of the global pandemic, with so many activities moving online.
- Zoom and other video conferencing platforms are social media as much as any other programme and should be respected as such.
- **Careless use of social media risks damaging the union’s reputation, work and interests, even indirectly.**

#### **Your responsibilities**

- All Unite social media activities must comply with the Unite rule book: <https://www.unitetheunion.org/media/3470/unite-rule-book-effective-following-2019-v2-072020.pdf>
- The Unite rule book remains sovereign and failure to comply may result in disciplinary action.
- All Unite accounts, web pages, blogs or similar should be regarded as the property of the branch/ sector/group which posts them and they are legally as well as generally liable for all content posted.

- Members' privacy, data protection and security are always paramount and no posting by an officer, rep, organiser or member should compromise these.
- Be aware that under the General Data Protection Regulation (GDPR), anyone can ask Unite to supply ALL data it holds on them, and that this includes social media conversations in which they are named, even those intended to be private or held in closed groups.
- GDPR must also be complied with in terms of the storage of member and non-member data, the keeping of private email lists and the sharing of data with third parties. If in doubt, seek advice from an appropriate officer.
- Unite does not accept any liability for the social media accounts of officers, reps, organisers, sectors, regions or groups.
- Posting in a personal capacity does **not** allow any other parts of this policy to be breached.
- Irrespective of what a personal profile may claim, any social media account with Unite in its title, name or handle is not personal to the account holder and posts will reflect on and directly impact on the reputation of Unite.
- Stating that views expressed do not represent those of Unite does not protect the union from being brought into disrepute or facing legal action, if the post is from an account with Unite in the name or the poster has linked their personal profile to a Unite social media page.

## Always remember

- Branch/sector/group social media platforms are there to promote the aims and values of Unite.
- Check your spelling and grammar before you post. If in doubt use a website such as Grammarly to help you. Find out more here: <https://www.grammarly.com/>
- When attaching graphics, memes and videos to posts always make sure they comply with those aims and values. Also ensure that they are the right size and length for the given channel. Some guidance can be found here: <https://www.falcon.io/insights-hub/topics/social-media-management/social-media-images-guides/>

- If you are making your own videos for use on social media, make sure that they comply with the rules set out throughout this guidance. Also ensure that they are subtitled, and that the subtitles are proof-read before the video is shared. Find out more here: <https://www.vidyard.com/blog/social-media-video/> And Kapwing is a useful site for adding and editing subtitles: <https://www.kapwing.com/subtitles>
- When organising official Unite events/conferences via Zoom or other platforms, make sure you use a British Sign Language interpreter. You can find information about the work of interpreters and how to book them on the NUBSLI website (NUBSLI is a branch of Unite): Visit the site here: <https://nubsli.com/>
- Social media platforms should always be regarded as public space, regardless of account settings, security settings, titles and profiles. Always observe the same manners, protocols and respect towards your colleagues as you would if you were physically in the meeting room. We have produced some short video guides to setting up and using Zoom and WhatsApp. Please take a few minutes to watch them here: [https://www.youtube.com/playlist?list=PL\\_CA8fbghqrKTw4-yYK9ZhGJMAwyOFixw](https://www.youtube.com/playlist?list=PL_CA8fbghqrKTw4-yYK9ZhGJMAwyOFixw)
- Don't post comments from official Unite, or Unite related accounts about Unite policy, industrial disputes, elections or other union issues without first clearing it with the relevant officer.
- Aggressive, divisive and unnecessarily controversial content must be avoided. This includes inappropriate language, sounds and images.
- Deleting posts that contain these does not remove their digital footprint and does not guarantee they will not already have been viewed or screen grabbed.

## General do's and don'ts

- Always conduct yourself with respect for others' opinions, however much you disagree with them. Remove yourself from a discussion before things get out of hand.
- Remember, journalists trawl the accounts of Unite activists looking for posts that may portray the union in a bad light, or to deliberately misrepresent Unite policy on a political issue.

- Only post online if you understand that there is no privacy, even if it's in a private blog or site, a private WhatsApp group or closed Facebook page. Always remember that what is written can be shared publicly by other members.
- Don't like or share the social media posts of others without reading them properly first.
- Don't use direct messaging on Twitter to get into debates and rows – DMs are no more secure than any other post, if the recipient decides to share them.
- The same goes for WhatsApp conversations and private messaging on Facebook.
- WhatsApp and other messaging apps need rules of behaviour and conduct as much as any social media platform to prevent abuse, digital trash, saturation of memes, harmful material and abuse.
- Ignore the trolls. Trolls are accounts that deliberately sow discord by starting quarrels or upsetting people, often by posting inflammatory, extraneous, or off-topic messages. If you engage with them, they will get worse.
- Always check links before posting them to ensure they go to where you intend them to, and not to something offensive.
- **Don't post drunk.**

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