

UCU Retired Members Branch Handbook

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1 Introduction

This handbook has been produced principally for support and guidance of officers of RMBs. It is recognised at the time of writing (September 2023) that RMBs operate in a variety of ways; some are well established, others not, while others are getting going again after the pandemic and the period of isolation it entailed. Much of the material is of an advisory character. We welcome feedback on the usefulness and content of this document. Material may be added from time to time.

2 Roles and Function of RMBs

While each RMB may develop work around particular issues, such as pensions, the environment, health and social care, transport etc., depending upon the interests of the members and the local context, it may be useful to attempt a summary of the likely areas of work of RMBs.

2.1 To represent the interests of retired members within UCU and the wider union and pensioner movements

This role relates to areas of union policy, structures for participation and rights of retired members. RMB representatives should, if possible, attend regional committees and national conferences. It is important to ensure that retired members do not get forgotten and to provide a voice for retired members, especially when governments and the media try to divide generations by blaming older people for the problems of younger people.

Work in the wider movement includes submitting motions via UCU structures to TUC conferences and representing your branch within the National Pensioners' Convention, Trades Union Councils and regional TUC retired members structures. In many areas the NPC holds regular meetings and runs a variety campaigns. Some Regional TUCs have an active forum for Retired Trade Unionists.

2.2 To provide a forum within the union for retired members to come together to consider and debate matters of mutual interest

Often RMBs select topics for speakers and for discussion from suggestions from members. Matters discussed should fall broadly within UCU's Aims and Objects concerning educational and professional issues, equality and advancement of employment rights. Hence many of the matters for discussion will not necessarily be matters exclusive to retired members. Moreover, some RMBs are interested in social issues such as transport and health and social care, which are part of the social infrastructure which support post-16 education and contribute towards the achievements of the sector. These are relevant issues for retired citizens, for UCU's working members and for the population in general, since everyone has an interest in decent pensions and good quality public services.

2.3 To provide a resource of collective memory, advice and expertise in support of the wider union, in particular to those still in active employment

Through work with branches and participation in regional committees, equality networks and other UCU structures, retired members may support to members still in employment, for example by supplying information about the history of collective agreements or union organisation in a workplace.

2.4 To provide active support, where appropriate, by involving as much of the branch as possible in support of the wider interests of the union and its members, including support for those still in active employment.

Examples of work undertaken by RMBs in this respect include solidarity visits to picket lines, participating in regional committees and equality networks, and help with get the vote out and union recruitment activities.

3 Rules and financial procedures

3.1 Rules relating to retired members

Eligibility for membership is defined in Rule 3.1.2

3.1.2 Persons who have been (but are no longer eligible to remain) a member under Rule 3.1.1 and who become unemployed, or retire and no longer continue in qualifying employment, or have been (but are no longer eligible to remain) a

student member provided they retain an active interest in Further Education/ Learning and Skills Sector or in Higher Education, and shall include those persons who were immediately prior to the effective date of the amalgamation of AUT and NATFHE ('the effective date'), an attached or retired member of AUT or an associate member of NATFHE.

3.2 Location of Retired Members in Branches is defined in Rules 12.4 and 12.5

12.4 Members who are retired shall belong to a regional retired members' branch or to a Branch/Local Association local to them, unless the member chooses to belong to their former branch/local association instead. On retirement all members will be contacted by HQ to ascertain their chosen Branch/Local Association.

12.5 Retired members assigned to a retired members' branch may attend meetings of their former local association/branch, and retired members assigned to a workplace local association/branch may attend meetings of a regional retired members' branch, but in either case they may hold office and vote in national elections only in their assigned branch/local association.

3.3 Model Branch Rules

Each RMB should have branch rules which are consistent with the national Model Branch Rules, which can be found at this link: <https://www.ucu.org.uk/ucurules>

Variations from the Model Branch Rules

There are elements of the model branch rules which are not applicable to RMBs, and other elements where RMBs may wish to consider variations from the model branch rules.

Elements which are not applicable to RMBs include:

- the post of anti-casualisation officer (Model Rule 7.3)
- the reference to industrial action ballots (Model Rule 10.1)
- ratification of agreements (Model Rule 20)
- site organisation (Model Rule 24)

Elements where RMBs may wish to consider variations from the model branch rules include:

- including the office of vice-chair (Model Rule 7.3)
- focussing the duties of the Equality Officer on issues related to retired members (model Rule 8.6)
- including the office of Environmental Officer
- specifying that officers take up office at the end of the AGM (Model Rule 9.5)

These variations should be considered when reviewing branch rules before submission to head office for approval.

There is a case for the development of model branch rules specifically for RMBs, which is being considered by the RM Committee

3.4 What retired members can do as UCU members

Retired members can be delegated from their branches to regional committees, UCU Congress and local Trades Union Councils. They can stand for some elected offices in UCU, such as trustee and regional committee posts.

Members of RMBs can vote in UCU elections for trustees, national officers and non-sectoral NEC seats.

Retired members cannot take part in ballots for industrial action or vote on settlements of industrial disputes.

3.5 Representative structures for retired members

These are defined in Rule 24 of the UCU Rule Book:

24 National Meetings of Retired Members and Retired Members' Committee

24.1 There will be a formally scheduled meeting of all retired member branch delegates to Congress which will be held at a time when Sector Conferences are in session. The meeting shall elect a chair from amongst those attending. Any resolutions agreed by the meeting may be forwarded to the NEC if so decided.

24.2 A formally scheduled meeting of representatives from Retired Members Branches shall be held annually in the autumn term, which will have the right to forward resolutions to the NEC. The meeting will elect a chair from amongst those attending. Representation shall be on the basis of two members per retired members' branch. This meeting shall elect delegates to the Retired Members' Committee.

24.3 The meeting shall elect UCU's representatives on the Executive and National Council of the National Pensioners' Convention, representative(s) on the Public Service Pensioners Council and the UCU representative on the TUC Pensioners Committee.

24.4 The meeting shall select from among resolutions it has carried at its current and immediate previous annual meeting two motions for sending to the BDC of the NPC.

24.5 There shall be a Retired Members' Committee, which advises the NEC on matters relating to retired members. The Retired Members' Committee shall have the right to send two motions and two amendments to UCU Annual Congress.

3.6 Financial procedures appertaining to RMBs

Each RMB elects a treasurer at its AGM. Branches receive funds from head office, based on the number of members in the branch. Rule 6 of the Model Branch Rules deals with financial procedures and what branch funds can and cannot be spent upon.

Typical expenditures of an RMB are:

- payment of travel expenses for members to attend in-person meetings
- cost of Zoom subscription for online or hybrid meetings
- hire of venues for in-person meetings
- subscriptions to local Trades Union Councils
- subscription to regional National Pensioners' Convention branch
- secretarial expenses, e.g. photocopying, stamps, envelopes
- delegate travel expenses to events at which the member is representing the branch, where such expenses are not paid centrally
- donations to campaign groups and charities whose aims are consistent with the aims of UCU
- purchasing a branch banner.

This is the extract from the model branch rules relating to funds:

6 Use of funds

6.1 All expenditure by the Branch/LA must further the objects of the Branch/LA. The finances of the Branch/LA shall be conducted in accordance with arrangements determined by the National Executive Committee which shall include an audit and report prepared in accordance with instructions issued by the Honorary Treasurer.

6.2 No funds of the Branch/LA will be used for affiliation to a political party, or for the furtherance of the union's political objects. Under trade union legislation, any expenditure on political objects must be made from a designated political fund, which is established and continued by a vote of the membership every ten years. This fund, set up in accordance with UCU rule 31 and Schedule C to the rules, is one per cent of membership subscriptions and members may opt out of paying it. (Northern Ireland members opt in.) All expenditure on political objects must be made nationally out of this designated political fund; expenditure on political objects cannot be made out of local funds. Political objects may be broadly described as electoral or other party political activities.

6.3 The funds of the Branch/LA will be used for:

6.3.1 Costs incurred in the proper conduct of the business of the Branch/LA, as agreed by the committee.

6.3.2 Payment of the expenses of any members duly appointed by the Branch/LA to represent it.

6.3.3 Payment of other such expenses as will from time to time be determined by a majority of members present and voting at a quorate general meeting of the Branch/LA, subject to 6.1 and 6.2 above.

6.3.4 Donations to charities or other bodies whose objects are consistent with those of the Branch/LA. Donations greater than [insert amount] must be approved by a general meeting of the Branch/LA; donations below this amount may be approved by the committee.

Link to UCU Rulebook: <https://www.ucu.org.uk/ucurules>

4 UCU structures for retired members

UCU provides a variety of ways for retired members to be active and represented within UCU. Retired members can belong either to a Retired Members' Branch or to a former workplace branch.

4.1 UCU Annual Meeting of Retired Members' Branches

This is based on two delegates per RMB. This meeting elects the members of the Retired Members' Committee. It receives annual reports from RMBs and each RMB can submit up to three motions to this Annual Meeting. These motions are advisory to the NEC. The proceedings of the Annual meeting of RMBs are available on the UCU website [link]

The Annual Meeting of RMBs is also responsible for electing UCU representatives to NPC (National Pensioners' Convention) and PSPC (Public Services Pensioners Council).

The meeting elects UCU's representatives on the National Executive Council and BDC of the NPC and Representatives at the AGM of the PSPC, a nominee for the Executive of the PSPC, and, nominee(s) for Officers of the PSPC.

4.2 Meeting of retired members at UCU Congress

At Congress, usually on the day of the Annual Sector Conferences, there is a meeting of delegates from RMBs. This is an opportunity to discuss the work of RMBs and issues of relevance to retired members. Retired members who are present at Congress in other capacities, such as Trustees and Congress Observers could also be invited to attend this event as non-voting participants.

4.3 Retired Members' Committee

UCU has a Retired Members' Committee which meets three times per year and which is responsible for supporting the work of RMBs and advising the union on matters related to retired members. Two members of NEC are elected by NEC to serve on the Retired Members' Committee.

Members of retired members' committee:

<https://www.ucu.org.uk/article/12407/Retired-members-committee>

Link to Standing Orders: https://www.ucu.org.uk/media/12956/Standing-orders-of-the-retired-members-committee-and-annual-meeting/pdf/UCU_RMC_standing_orders.pdf

5 Some practical points and ideas about organising

5.1 Branch rules

As described above each RMB should have a set of branch rules, which are a variant of the national model branch rules. There are some parts of the national model branch rules which are not applicable to RMBs, such as the sections relating to site organisation and negotiations with the employer.

5.2 Maintaining membership lists and ways of communicating

Maintaining regular links with UCU's Membership Department and keeping up to date membership lists is important for any branch. For RMBs the challenges largely relate to the nature of the population we organise, with members moving home, moving into residential care or dying. Communicating with members can present some challenges. For approximately 2/3 of retired members, UCU has home email addresses. Email is the principal way of regular communication with members, but some email systems do not provide a bounce-back or evidence they are disused, so we cannot be sure that all email addresses we have are live.

There are problems in how to contact members without an email address. It is possible to write occasionally, but this involves time, and expenses, for which RMBs can claim postage and stationery costs. Prior to their retirement, it is important to encourage members to ensure that UCU has a home email address on its records, since many work email addresses are discontinued at retirement.

It is worth thinking about how often to communicate with members via email. Messages need to be sent out giving notice of branch meetings and other activities members are encouraged to support. It is generally desirable to leave a few days between emails, since over-frequent emails can lead to requests to be taken off the list.

There is also the question of how to communicate with retired members in workplace branches. One way may be a standing invitation to branches for those retired members interested in attending RMB meetings to notify the RMB secretary.

5.3 How to organise meetings – hybrid, in-person or online only

As with other labour movement structures and voluntary organisations, RMBs have been coming to terms with the new world of meetings post-pandemic. At one time going to a meeting meant attending an event in-person. Now it can mean attending in-person or it can mean joining on line. There are benefits to hybrid meetings, in that they give the opportunity for meeting in-person to those who wish to do so, while also allowing other participants to join online if it is more convenient for them to do so. Online options can facilitate involvement of some disabled members, especially those with mobility issues, and are also useful in the event of travel disruption on account of weather or transport issues. If running hybrid meetings or online meetings, it is important to have good IT support and ensure that more than one person is acting as host.

5.4 Topics and speakers for meetings

Some RMBs organise branch meetings round speakers to lead discussion on a particular topic. There are several possible sources of speakers. These include:

- other UCU activists contacted via regional committees or retired members networks
- local TUCs and NPC groups
- PhD students and academics carrying out relevant research work
- climate activist groups
- international solidarity groups

5.5 Running a hybrid Zoom meeting

Zoom can be useful for getting speakers from further afield.

Running a hybrid meeting on Zoom requires the following equipment:

- a computer (either PC or Mac)
- a webcam¹
- a desktop or floor standing tripod for the webcam which enables you to position the camera either to focus on the main speaker or floor speakers.

¹ A current good webcam is the Logitech Brio Stream Webcam. This is a small buy very good device which includes a noise-cancelling microphone. The current cost at August 2023 is about £150.

If a large exterior screen is available in the meeting room, this is useful both for external speakers and to display any online speakers during the meeting. To use this, you would also need:

- a cable to connect to the screen²
- an adapter to connect your computer to the cable³
- optionally, an external speaker connected to your computer⁴.

Using a tablet for the chair

Another option is to use a tablet (such as an iPad) for the chair. This connects to Zoom separately from the main computer and displays the chair on Zoom. It means that you can easily switch between main/floor speakers and the chair or even have them both spotlighted⁵ at the same time.

- As the computer and tablet are next to each other, it is necessary to disconnect audio from the More menu on the tablet to avoid feedback.
- It's useful to have a stand for the tablet to position it effectively.

Zoom software

If you have a second external monitor, you can select a user's screen then 'Pin to second monitor' to display on the external monitor⁶

5.6 Other activities, campaigns, demos, protests, lobbies etc.

RMBs can take part in a wide range of union activities, including solidarity visits to UCU picket lines, labour movement events around International Workers' Memorial Day and May Day, cultural events and NPC activities. For instance a few years ago the NPC held a rally in York to celebrate the tenth anniversary of the bus pass. Signing online petitions in support of working members and other suitable causes is another activity worth encouraging. This is something all retired members with IT access can do.

5.7 Banners/flags for RMBs

Some RMBs may wish to acquire a branch banner. This is good assuming there is someone with transport to take it to events and sufficient members able to carry it. Branches may

² Usually by HDMI; if an older screen by VGA.

³ E.G. USB to HDMI

⁴ A USB small speaker costs about £10

⁵ Spotlighting enables you to control showing one or more speakers on the screen rather than all participants in the gallery

⁶ Assuming your computer's screen is set to 1st monitor and the external monitor to 2nd monitor.

also wish to consider investing in small banners and pennants, which individuals can hold and even transport via buses and trains.

5.8 Central file on UCU website organised by year and perhaps branch of all RMB newsletters.

We are looking into establishing a central repository of RMB newsletters.

5.9 Publicising the work of RMBs and its availability for retired members

It is important to publicise the work of RMBs to members, potential members and to working members of UCU. A regular report to regional committee is one good way of keeping in touch. It is important, via branches, regional committee and regional office, to try to contact members prior to retirement to give information about the work of the RMB and to encourage members to join.

5.10 Recruitment of retired members, including people whose membership has lapsed

It is important, as for any branch, to recruit members to the RMBs and to encourage them to be active. One way is to make sure members close to retirement know about the work of the RMB. It is also possible to recruit to RMBs ex-members who were members of UCU but whose membership may have lapsed on retirement or earlier. In order for such lapsed members to rejoin, it is necessary to contact the Membership Office directly at UCU.

5.11 Links to regional committee

Each RMB can send motions to the regional committee and send delegates on the basis of one delegate for every 100 members or part thereof. Involvement in the regional committees is useful for keeping in touch with current issues within UCU, finding opportunities to support working members and recruiting members who retire. It can be a good idea to submit periodic written reports of the work of the RMB to the regional committee.

6 Newsletters and websites

Some branches already have very effective regular bulletins and newsletters. These are vital in keeping in touch with members. It is good to encourage members to write for the RMB newsletter.

The East Midlands RMB has had its own website for several years at: www.ucu-em-rmb.org.uk and a Twitter/X account @ucu_em_rmb, which is particularly useful during industrial disputes.

Scottish RMB also has its own website: <https://www.ucusrmb.scot/>

Some RMBs have Facebook Pages.

7 External links

- National Pensioners Convention - <https://www.npcuk.org/>
- Regional TUC Retired Members Committees – these can be contacted via Regional TUC offices
- Age UK - <https://www.ageuk.org.uk/>