BDA Trade Union Representatives Case Recording System

Introduction

To be able to provide better support for the BDA Trade Union Representatives and to enable them to be able to manage the case work that the representatives are doing on behalf of members in the workplace and also to enable the BDA to have more accurate information on what is occurring in workplaces a new system is being introduced.

BDA Trade Union will operate this new system from Tuesday 1st November 2016.

When to Use the new system

The new system works on the principle that a BDA Trade Union Representative's activity in respect of representing members falls into three areas:

1.   Representing members with personal cases;

2.   Representing a group of members with a collective issue;

3.   Representing members or the BDA Trade Union on local Staff Side Committee and other workplace committees.

This new system will be used to address representing members with personal cases and representing a group of members with a collective issue.

Note:

Obtaining details of representing members or the BDA Trade Union on local Staff Side Committee and other workplace committees will still be done via the biannual Trade Union Representative Activity Survey and no need to complete these new forms.
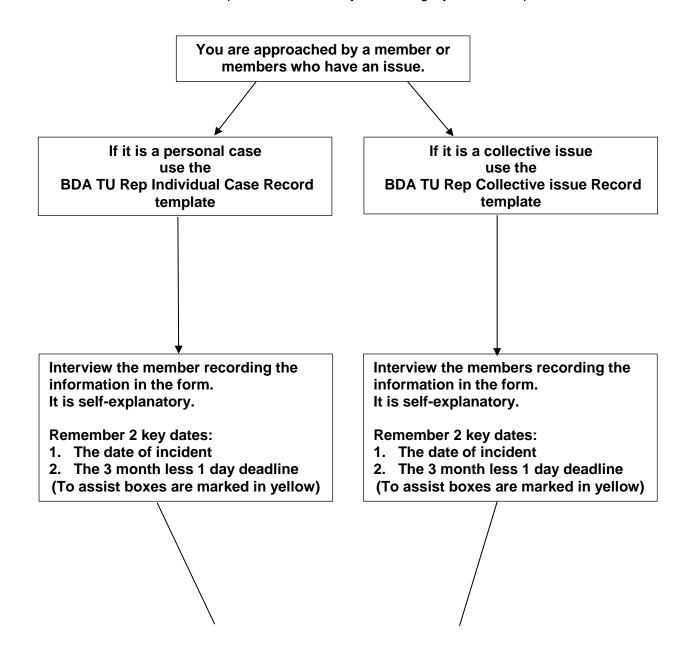
Resources

The current BDA Caseload Management Toolkit template which representatives are currently using with every case to collect the relevant case information will be replaced by two template documents:
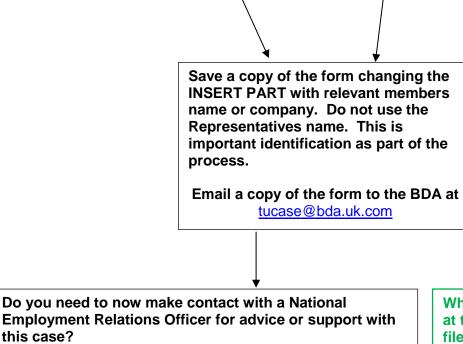
1.   BDA TU Rep Individual Case Record - INSERT MEMBER NAME HERE

2.   BDA TU Rep Collective Issue Record - INSERT COMPANY NAME HERE

Where a member has more than one case which are not connected then use a separate from for each case (as they will proceed differently and with different time scales).

The System

The new BDA Trade Union Representative Activity Recording System is simple.

You are approached by a member or members who have an issue.

If it is a personal case use the BDA TU Rep Individual Case Record template

If it is a collective issue use the BDA TU Rep Collective issue Record template

Interview the member recording the information in the form.
It is self-explanatory.

Remember 2 key dates:
1. The date of incident
2. The 3 month less 1 day deadline
 (To assist boxes are marked in yellow)

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Save a copy of the form changing the INSERT PART with relevant members name or company. Do not use the Representatives name. This is important identification as part of the process.

Email a copy of the form to the BDA at tucase@bda.uk.com

Do you need to now make contact with a National Employment Relations Officer for advice or support with this case?

This is especially important if it is a potential Employment Tribunal case.

(Just emailing in the form will not get a NERO's response)

When the form is received at the BDA Office it will be filed in a collective file for the respective year.

The NERO will open a case file for the case in the BDA case record system.

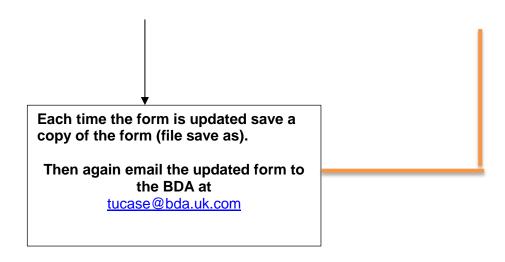**Dependent on the issue the NERO may take over the case from the TU rep.**

The NERO can obtain a copy of the submitted form.

The TU Rep will have continued contact with the member or members as the case progresses and attend meeting and gather documents.

As this takes place the representative will update their copy of the activity form.

Each time the form is updated save a copy of the form (file save as).

Then again email the updated form to the BDA at
tucase@bda.uk.com

The form is updated every time any action takes place by the trade Union Representative and saved so it is a continuous log of activity that has been taken in respect of the case.

Then it is emailed into the BDA trade union office at tucase@bda.uk.com where it replaces the previously received version.

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Summary

This new system is intended to provide the BDA Trade Union Representatives with a case management system to support them when dealing with member issues and enable the BDA to provide support and guidance to the Trade union Representatives.

It will also enable the BDA Trade Union Team to identify issues or trends which may require additional training or guidance for the BDA Trade Union Representatives and the membership.

If there are any issues or questions about the new system please contact the BDA Trade Union office for advice.

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