



Welfare Officer Handbook.

Guidelines for Branches and Chapels.



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Photograph © Jason Harris

Being part of the NUJ is so much more than receiving support, guidance and representation throughout your working life – it's also about knowing that the union has your back when times get tough. NUJ extra is a small charity with great reach, one that prides itself on being there for NUJ members and their dependents when they need it most.

The support from Branches and Chapels for our charity is vital, and the work that our Welfare Officers carry out on the ground makes an enormous difference – raising awareness of the support the charity can offer, being there to help members in difficult times and liaising with NUJ extra trustees. We know from beneficiaries of NUJ extra just how much they appreciate the support and help that Welfare Officers have provided to them and their families.

This handbook is intended to support Welfare Officers in this important role, and to share good practice and advice.

Huge thanks to everyone who takes on this work, putting the 'extra' into the NUJ – it is much appreciated.

In Solidarity,

Michelle Stanistreet

NUJ General Secretary and NUJ extra Trustee

Contents.

Click to navigate 

- Section 1** About these guidelines.
- Section 2** Background to NUJ extra.
- Section 3** The structure of NUJ extra.
- Section 4** The role of the Branch/Chapel Welfare Officer.
- Section 5** Getting started.
- Section 6** Good practice.
- Section 7** Our services & managing enquiries.
- Section 8** Communication & interviewing skills.
- Section 9** Financial assistance.
- Section 10** Case studies.
- Section 11** Publicity & fundraising.

Section 1

About these guidelines.



5

Introduction and mission statement.

What are these guidelines?

Who should use these guidelines?

How to use these guidelines.

Why have volunteer guidelines?

Contents 

This section is an overview of the Branch/Chapel Welfare Officer guidelines: how to use them, who should use them and what they are for. This chapter is intended to give you an idea of what is in the rest of the manual.

Introduction and mission statement

NUJ extra is the union's unique charity. We provide support, confidential advice and financial assistance to members and their immediate family at times of need when they may have nowhere else to turn. This assistance is often delivered through our network of Branch/Chapel Welfare Officers, who give their time voluntarily to help their fellow members in crisis. Without them, this service would not exist.

Our mission is to:

- *Be an invaluable resource for NUJ members when they are in need.*
- *Provide high quality advice, information and assistance to members in need.*
- *Offer financial assistance to members and their dependants who are experiencing unforeseen hardship and who meet the criteria for support.*
- *Deliver services that are flexible, relevant and responsive.*

We will look in detail at the different kinds of help that NUJ extra provides in Section 7



What are these guidelines?

These guidelines were written as a result of NUJ extra's commitment to provide training for its volunteers. They enable anyone interested or involved with the charity to understand the work we do and the standards of practice we follow. They are intended to allow Branch/Chapel Welfare Officers to train and develop themselves.

The guidelines are also a source of reference for any NUJ member interested in our work, and a permanent resource for each Branch or Chapel.

We hope they will ensure the best practice from our network of volunteers, and result in the highest standards of service for NUJ members.

Who should use these guidelines?

They have been written primarily as a guide and a resource for Branch/Chapel Welfare Officers, and any NUJ members considering volunteering as a Welfare Officer.

How to use these guidelines

These guidelines are organised into 11 sections.

Each of these is divided into shorter parts so you can quickly find the information you require. Don't feel you have to read them from cover to cover.

A good place to start if you are new in post is Section 4, on the role of the Welfare Officer.

There is a "getting started" checklist in Section 5



...and a diagram of the typical stages of assistance you might provide in Section 7.



There are many other checklists throughout these guidelines which are intended to help you remember and act upon all the advice and information you are receiving, and for learning about your new role.

Why have volunteer guidelines?



Guidelines help to establish high standards within NUJ extra. They make volunteering easier, and improve the experiences of members who come to us for help with issues that often have an adverse impact on their health, finances, family stability and performance at work.

NUJ extra complies with current legislation on charities and adheres to the standards of good practice for charitable organisations. It is also crucial to follow proper health and safety standards. We want to ensure that all our volunteers can carry out their activities in a safe and legal manner, and that they are not put at risk.

NUJ extra values all those who volunteer to help their fellow members. We want them to feel they are being supported with training and materials which help them work effectively. This will also ensure there is a consistently high quality of assistance being offered to NUJ members, wherever they are. These guidelines will ensure that all volunteers have a full understanding of their role. Given that some Welfare Officers find it difficult to attend training sessions, they now have access to an information resource that they can use in their own time.

Section 2

Background to NUJ extra.

- 
-  7 Our proud story.
 - 8 Our legal structure.
 - 9 How is the charity funded?
Accountability.

Contents 

In this section, we will take a brief look at the history of NUJ extra and our plans to meet the challenges of the future. We will examine our charitable status and what that means in terms of the law, fundraising and accountability.

This section is intended to help you understand our organisation and the rules under which we operate.

Our proud story

The National Union of Journalists was founded in 1907. Three years later, the union established its first charity.

The motion called for the union to create a new fund “by voluntary contributions from members, by grants from management fund balance of Branches and collections at union gatherings”. It was to be used for the relief of the widows, orphans and other dependants of members left in distressed circumstances.

That year, the union was authorised to fund the charity by as much as £50 a year from interest on the union’s invested monies and a maximum of £50 from the union’s central funds. The first grants were made in 1911 and amounted to £10.

Three years later, the union was authorised to allocate two shillings per member to this fund. From 1911 to 1919, the fund granted a total of £416.

A separate fund

The problem was that, because it was only a nominal fund, at the end of each year any balance was returned to the general fund. To separate the money completely, in 1920 it became the Widows and Orphans Fund. Union allocations amounted to £434, donations to £408 and grants totalled £47, leaving a surplus of £801.

By 1956, the Widows and Orphan Fund had £152,800 allocated to it within NUJ accounts. The fund remained part of the NUJ accounts until 1970, when it was established as a separate charity.

In 1982, it changed its name and became the Provident Fund to reflect the wider diversity of beneficiaries.

Members in need

There then followed some debate with the Charity Commission about the use of the fund. Despite the first ever certificate from the Charity Commission stating that “the trustees may apply the same for the relief of distress among members of the said union who are in necessitous or straitened circumstances”, this clause disappeared from later revisions.

When the trustees began to help members in need, rather than dependants of deceased members, the Charity Commission did not approve. That led the trustees to establish the Members in Need Fund in 1992, with a supportive donation from the NUJ and many of its Branches. The first payment to a beneficiary was made in 1995.

Within a decade, the Charity Commission had changed its mind on the splitting of such charities, partly because of the huge number of allied charities across many industrial sectors. The NUJ was typical, having two charities with the same trustees and administrators, the same fund manager, auditor and book-keeper. It all seemed unnecessary duplication.

The merger

The trustees first mooted the idea of merging the two charities in 2003. The formal merger was approved by the Charity Commission in December 2005, with the name changed to NUJ extra.

At that time, the combined funds were worth just over £2 million. Grants for that year totalled more than £84,000. In anticipation of the merger, the trustees authorised the biggest-ever increase in the ceiling used to calculate weekly benefit for continuing beneficiaries.

The amount per person rose from £130 to £150 a week, while the grant for each dependant increased from £50 to £75. In 2007, the trustees raised the ceiling to its highest level – £175 plus £90 for each dependant. One-off grants were also considerably increased.

Our legal structure

What is a charity?

A charity is a voluntary body set up to help society in some way – whether that's helping certain groups (such as NUJ members) or elsewhere in the world, promoting arts or sport, or helping the environment etc. Charities cannot make profits – all the money they raise has to go towards achieving their aims.

Who regulates charities?

The Charity Commission for England and Wales is the non-ministerial government department that regulates registered charities in England and Wales and maintains the Central Register of Charities.

The Charity Commission answers directly to the UK Parliament rather than to government ministers.

In Scotland, the Office of the Scottish Charity Regulator performs a similar function.

In Northern Ireland, it is the Charity Commission for Northern Ireland.

In the Republic of Ireland, the Charities Regulator maintains a public register of charitable organisations and ensures their compliance with the Charities Acts.

What is a Constitution?

This is our governing document, which has been approved by the Charity Commission. It works as a rule-book setting out our charitable purposes ('objects') and what our charity can do to carry out its purpose ('powers').

Our Constitution & Rules stipulate that our activities must focus on helping members who are facing unforeseen hardship. These include:

- *Illness*
- *Injury*
- *Relationship breakdown*
- *Bereavement*
- *Loss of income*

Currently, our activities centre on supporting members in four key areas:

- *Financial assistance*
- *Health & Wellbeing*
- *Debt advice*
- *Signposting, support and information*

We will look at each of these areas in turn in Section 7.



Our governing body

Charity law requires a body of people called 'trustees' to run the charity. This group has ultimate responsibility for management and administration, and for the effective use of any money it receives.

Political neutrality

NUJ extra is not a political body and is separate from the NUJ. It is regulated by the Charity Commission, which has very different rules and controls.

We look further at the role of the trustees in Section 3.



How is the charity funded?

Like all charities, we receive our income from donations and investments. Our funds are managed by Epworth Investments, a company initially established many years ago to ethically manage the funds of the Methodist Church. We now have a more ethical investment approach and engage with our fund managers over matters that concern us. Our fund managers are active shareholders, voting against excessive remuneration for company directors and lobbying for better ethical and employment standards. We think we made the right choice.

The majority of our donated income comes from the NUJ itself. We have to make an annual report to the Charity Commission, including accounts for the year which must be audited. We are committed to keeping clear accounts for all our fundraising activities and expenditure.

A large proportion of our expenditure goes on grants to individual members and long-term beneficiaries. The remainder is spent on staff, fund raising, publicity costs and trustee expenses. It is very important that all money paid out is for purposes that achieve our charitable objectives, and nothing else.

Fundraising is an important activity as it helps us to expand our standard services and develop new ones to meet members' needs.

Accountability

Our board of trustees is accountable to a variety of people and organisations – to the Charity Commission, to our donors and to staff and volunteers.

Branch/Chapel Welfare Officers are accountable both to their committee, of which they are a member, and to the charity itself.

The NUJ is our main donor. It is important that NUJ extra does not become involved in political activity. Whilst the charity is part of the family that is the NUJ, it is still a separate legal entity that operates under a Constitution and Rules that have been approved by the Charity Commission.

Meetings

The NUJ Rule Book requires that we hold at least four ordinary meetings every 12 months. This provides us with the opportunity to reflect on our successes and to look to the year ahead. The chair of NUJ extra presents a report about the organisation's work at the union's Delegate Meeting. Between these meetings, interim decisions may be taken by the Chair and Vice-chair of NUJ extra in conjunction with the union's General-Secretary, for cases involving grants of £1,000 or less.

Section 3

The structure of NUJ extra.



11

Volunteer structure.

Trustees.

Branch/Chapel Welfare Officers

12

Admin Support.

Recruiting and retaining Branch/
Chapel Welfare Officers.

Contents 

In this section, we will look at who does what within the charity. To find out about the NUJ more widely, please go to www.nuj.org.uk



Volunteer structure

NUJ extra relies on its network of volunteers to function, and so we would like to encourage as many members as possible to become involved with our work. The level of involvement varies between members, depending on how much time they can spare, how interested they are and their level of expertise in the kind of work we do. Some members may begin by helping out in our fundraising initiatives, for example.

Trustees

As a registered charity, we have to conform to charity law. This states that a body of people called 'trustees' must run a charity. They take responsibility for all the work done by the organisation, make decisions in the charity's best interests and ensure it is run cost-effectively and efficiently. NUJ extra has nine trustees. Five are elected by NUJ members at Delegate Meetings. Four are appointed by the union's National Executive Council. Each appointment is for a term of four years.

You can read biographies of our trustees by clicking the link at <https://www.nuj.org.uk/about-us/nuj-charities/nuj-extra/who-s-who.html>

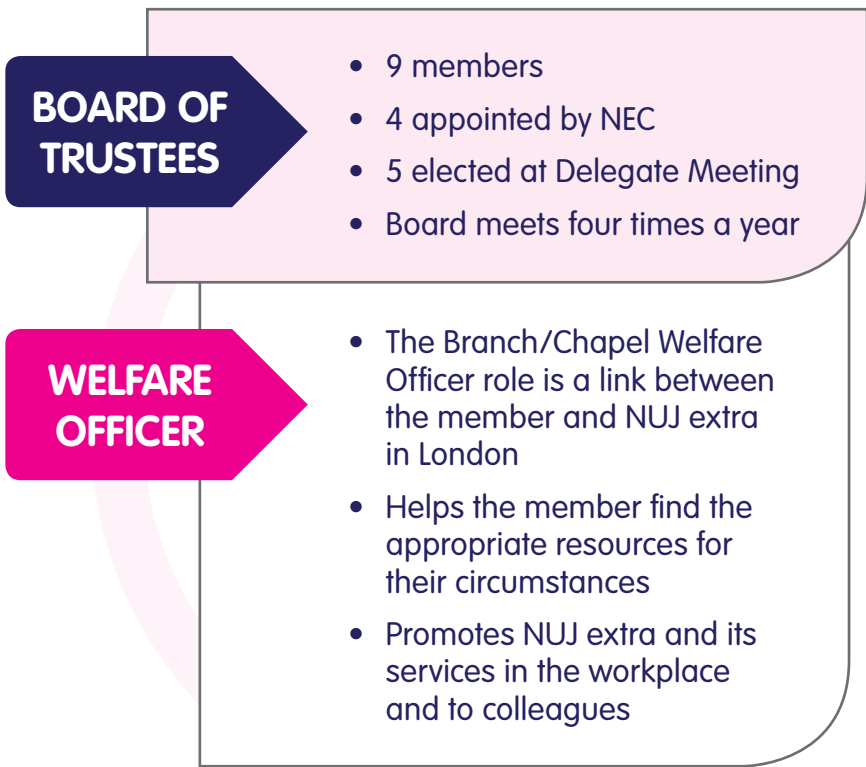


Branch/Chapel Welfare Officers

The NUJ rule-book recommends that Branches and Chapels elect a Welfare Officer wherever possible. Welfare officers may be the first point of contact for, and the "human face" of, NUJ extra. As a Welfare Officer, you will provide information, advice and services to members at a local level, help with applications for financial assistance, and ensure members are aware of the services on offer.

Welfare officers can come from any area of the NUJ's membership. Some volunteer because they have had experience of personal problems like illness, bereavement or debt, and feel they understand the problems that members can face. Some may be helped in their role by other officers or reps who become a 'welfare contact' for a specific section of the Branch/Chapel, for example a retired member who wishes to contribute to the wellbeing of their fellow retired members and to assist their Welfare Officer.

"I'd like to thank NUJ extra for making such a positive difference. You stepped in to save us from a very precarious financial situation."



Other volunteers simply have an interest in helping people in crisis. Whatever one's personal reasons for volunteering, empathy, the ability to listen well and give non-judgemental advice and support, and respect confidentiality are keys to being a successful Welfare Officer.

We look at the role in greater depth in Section 4. 

Admin Support

The paid, part-time fund administrator at Headland House in London is available to support the trustees, organise trustee meetings, take minutes, talk to members and signpost them to further information, liaise with Branch/Chapel Welfare Officers, and provide support in implementing financial decisions.

Recruiting and retaining Branch/Chapel Welfare Officers

The NUJ would like every Branch and Chapel to have a Welfare Officer. If yours does not, it is a good idea to start looking for someone suitable for the role. Officers can come from any area of the union's membership.

Some of the most important skills you need to develop are:

- *Listening skills*
- *Being non-judgemental*
- *Confidentiality*
- *Empathy*
- *Willingness to develop an understanding of statutory welfare benefits.*

NUJ extra runs training events to help Welfare Officers develop these skills and keep up to date. Our hope is that Branches and Chapels will support any training requests so that Welfare Officers know they are needed and valued.

Sometimes, a Welfare Officer will step down when no one else is prepared to take on the role. It is important to plan the succession of Welfare Officers rather than waiting until one resigns before finding a replacement.

“My application was handled with sensitivity and kindness. The help I received from NUJ extra has contributed enormously to my recovery from the experience.”

Salutations

A message from the current Chair of the NUJ extra Trustees, Chris Wheal.



When a car crash left my wife and I, both NUJ members, unable to work, we learnt the hard way just how fast – and through no fault of your own – you can fall from a comfortable life to being £30,000 in debt. It can happen to anyone.

The NUJ had just created its Members in Need fund, after the Charity Commission ruled that its existing charity, the Provident Fund, could help only widows and orphans. The fledgeling charity had no money to help.

The following year, I did a charity walk to the union's then annual delegate meeting to raise money for the Members in Need fund, a tradition I kept up for several years. The NEC nominated me to be a Trustee of the charities and at the next DM I was elected in my own right, later taking over as chair.

When the Charity Commission permitted us to remerge the charities, we created NUJ extra. I have been proud of everything NUJ extra has done since.

This handbook is just part of the increasing professionalism we have introduced to our work. It was an idea suggested by Welfare Officers during a hugely successful training and feedback day.



Welfare officers are unbelievably helpful. It might just be to verify a key fact, or to provide an independent assessment, or to spot what would make the biggest difference. It may mean a bit more hand holding for a beneficiary who needs our care.

Unions aren't just about strikes and employment and fighting for rights. They are about community and aid and mutual support. Welfare officers are at the heart of that. It often means working on private cases where not shouting about your role is as important as the work itself. Welfare officers are the best kept secret in the NUJ. You are our unsung heroes and I salute you.

Chris Wheal

Section 4

The role of the Branch/Chapel Welfare Officer.

- 
-  14 The role of the Welfare Officer.
How we work.
What makes a good Branch/Chapel Welfare Officer?
 - 16 What skills do Welfare Officers need to develop?
 - 17 What is the Welfare Officer's place within the Branch or Chapel?
 - 19 Checklists.

Contents 

The role of the Branch/Chapel Welfare Officer

In this section, we look in detail at the role of a Welfare Officer. We will look at the qualities and skills the role requires, and the rights and responsibilities it brings within the Branch or Chapel. We will also look at what you should be doing to get started in the role.

This section is essential reading for all new Welfare Officers. There is a checklist at the end of this section to help you.

How we work

We pride ourselves on trying to do the following when we work with members:

- Being supportive and non-judgmental, aware of our prejudices but removing them from the process as far as possible.
- Dealing with every member/case individually.
- Encouraging members to act for themselves rather than trying to do everything for them.
- Occasionally giving bad news as part of the job, trying not to give false hopes but always trying to offer additional or alternative forms of help.
- Managing expectations – it is not always possible to agree.
- Understanding the significance of endorsing an application form for financial assistance as factual and identifying any unforeseen, unexpected or exceptional circumstances.

What makes a good Welfare Officer?

There are many aspects to being an effective Branch/Chapel Welfare Officer. Let's consider some of the more important attributes.

A desire to help members

This is the first and, perhaps, most important part of being a Welfare Officer. If you want to make a difference to the lives of members in need, being a Welfare Officer can be immensely rewarding. Many Welfare Officers volunteer after experiencing their own difficulties and want to assist others in a similar situation. It is important, however, to want to help all members who contact you, even if their situation is not one with which you are familiar.

Being an ambassador

For many members, the Welfare Officer will be a vital point of contact with the organisation. It is important to bear in mind that their opinion of NUJ extra will be based in part on the impression you create. You should always try to behave in a way that reflects well on NUJ extra, the union and the work it does.

We will look in detail at the standards of good practice that we expect in Section 6.



Being clear about your role and about the services that are available

A key part of being an effective Welfare Officer is understanding your function within the organisation. You do not need to be an expert in every type of problem that members face. You do, though, need a genuine interest in getting information so you know what we can offer and which other agencies may be of help. Sometimes, you will not provide assistance directly, but you will signpost and be the point of access to services provided by us and other organisations. This role is sometimes known as being a “gatekeeper”.

An ability to work efficiently

You must be well organised as a Welfare Officer. Having an efficient system for keeping and tracking your records is essential for the effective handling of your cases, but also should anyone else ever need to attend to your work in case you are absent or if you decide to move on.

Ensure that correspondence comes directly to you as the named Welfare Officer, and that everyone who needs to know you are now in post is aware of it – especially your Branch/Chapel reps.

You can contact the NUJ Membership Department on membership@nuj.org.uk

Getting back to people quickly is important when you are a Welfare Officer, so it is helpful if you regularly check your email and voicemail. Help can often be required at short notice because of some unexpected event, and your quick response can help reduce the stress levels of those involved.

If you are going away and no-one else in the Branch or Chapel can deal with welfare enquires, then always ensure your colleagues, including reps, know to contact NUJ extra in London rather than delay getting help to your members.

Keep up to date

A good Welfare Officer will always keep up to date with the latest developments within NUJ extra. This may mean regularly checking the NUJ website for the latest news and information, ensuring all your materials and forms are current versions, carefully reading all communications sent by NUJ extra, and briefing your Branch/Chapel and its reps accordingly.

An understanding of equal opportunities issues

We are fully committed to providing an equal opportunities service which reflects the diversity of members and recognises the social issues they may face.

We will look in more detail at this issue in Section 6.



Asking questions, and seeking support and advice when unsure about something

It is always better to check anything you are unsure about before acting. The fund administrator and trustees are always there to answer any queries you may have and to lend support in difficult cases. Other Welfare Officers are also a valuable resource for advice, information and good ideas. It is important to recognise the stresses that can sometimes build when you act as a Welfare Officer, and to allow yourself to seek support from colleagues.

Undertaking training

Learning and improving your skills are vital to becoming a good Welfare Officer and providing a good service to members. Although it can sometimes be difficult to fit training into your schedule, you should do your utmost to attend as much as possible. Whenever NUJ extra sends you information, it is important. Make sure that you give priority to these internal documents and that all items to do with welfare issues come directly to you.

We look in more detail at training in Section 5.



I've been the Welfare Officer (WO) of the Derry North West Ireland Branch for more than 10 years.

The Branch committee decided I was suitable for the role due to the fact that I am a qualified social worker.

As the Branch WO, I have dealt with many cases that made me draw on that previous professional life. Often, my task is to signpost a member to existing services within the statutory and NGO sectors. Sometimes, it involves contacting NUJ extra. Our Branch mails to members regularly flag up that there is a WO in the post and gives out my email address.

The skillset of a Branch WO and of a social worker are remarkably similar. The most important thing is to be approachable and non-judgmental from the off. My mindset is that if a member is contacting me as WO, then they're in some personal crisis. They need to be listened to, and they must be the focus of the intervention.

Over the past decade, I have dealt with everything from a freelance member who lived in a rural setting and couldn't find the cash to fix her ageing car (NUJ extra stepped up!) to serious family situations and intimidation from Northern Ireland paramilitaries. We donated £500 to NUJ extra during the Covid lockdown. We were not spending funds on everyday expenses, so those funds were best transferred over to NUJ extra to assist with that vital work.

Phil Mac Giolla Bháin

What skills do Branch/Chapel Welfare Officers need to develop?

The main skills you will need as a Welfare Officer are:

Listening skills

Being a good listener is a skill that all Welfare Officers need to cultivate. Really listening to the details of what someone is saying, rather than merely getting the gist of it, requires switching to a different frame of mind from everyday chatting. When someone is speaking at length, it can be easy to switch off and to nod mechanically or repeat a few stock phrases.

Please don't think this level of listening and concentration requires the skills of a trained counsellor, and that you may lack such ability. It doesn't, and we can all focus on the needs of others to the degree required.

We will look at this in Section 8 when going through the interview process.



Being non-judgmental

Sometimes, you may feel that a member has acted badly or unwisely. You may feel cynical about some of a member's claims. In such cases, you should be careful not to allow your personal feelings to influence your response to the member's situation. Our experience is that only a tiny minority of members ever try to take advantage of the system. It is far more common for members to be unwilling to seek assistance for which they may be eligible.

It is very important, both at the initial enquiry stage and during any subsequent discussions, to concentrate on getting the facts of the case clear rather than trying to judge cases for yourself. NUJ extra has devised robust guidelines for checking whether requests for financial assistance meet our criteria, and the team in London are able to judge cases objectively.

Empathy

Even when a member may have acted in a way of which you don't approve, you must try to empathise. This means putting yourself in their shoes and feeling what they feel, even if their situation is alien to you, or is one of which you disapprove. It is vital not to deter a member who has worked up the courage to seek help by sounding judgmental or disapproving.

We will look at verbal and non-verbal communication skills in Section 8.



Confidentiality

Confidentiality essentially means not disclosing any personal information about a member, about their contacting us, or about their difficulties. As a Welfare Officer, it is very important that you respect the highest standards of confidentiality when dealing with a member. It is vital to NUJ extra that members know they can contact us in confidence. Failing to maintain confidentiality will have a negative impact not only on your reputation as someone to turn to in times of crisis, but also on our reputation as an organisation.

We will look at NUJ extra's policy on confidentiality in more detail in Section 6.



Counselling approach

While Branch/Chapel Welfare Officers are not expected to be counsellors, 'counselling' is a term for the techniques used in helping people to learn about themselves. It involves helping them to develop the skills and self-awareness to cope with the problems and situations they may encounter. By listening in a non-judgmental way, by helping members to reflect on and summarise their situation, and by helping them to set agendas and make effective plans of action, you will empower members to help themselves.

We will look in more detail at some of these techniques in Section 8.



Awareness of statutory benefits and other sources of help

Although you will not be expected to become an expert on all available benefits (whether from the Department for Work and Pensions [DWP], other grant-giving charities, a local authority or your local support services and organisations etc.), the more knowledge you can gain on the types of benefits and range of support that exists, the better you will be able to advise members.

"Having experienced one the worst years of my life, I shall be eternally grateful to the trustees and administrators of our in-house charitable sector. Their care, compassion and kindness was so humbling."

Form filling (financial assistance)

We strive to make our application forms as straightforward as possible, but the information needed may be quite detailed. If we don't get all the information we need in the application for financial assistance, we will require much more of both the member's time and our time in trying to get it later. Helping a member to ensure their application form is correctly filled out, whether online or as a paper copy, may be an important part of your role if the member is not confident of doing this themselves. This means verifying that the information is correct, that all the questions have been answered and that all relevant paperwork, e.g. copies of bills, bank balances, etc. has been included.

We will look at the application form in detail in Section 9.



Understand your boundaries

Objectivity and detachment are valuable to any Branch/Chapel Welfare Officer. Being able to set boundaries so you can maintain proper relationships – friendly yet professional, with a degree of distance – will help both you and the member in the longer run.

We will look at this in more detail in Section 6.



"It's difficult to imagine where I would be without NUJ extra. As a freelance journalist hit hard during the Covid-19 pandemic, with commissions cancelled and future work drying up, being able to rely on my union and its charitable arm for financial aid has been indispensable. I will always be proud to be a full member and participant of this wonderful union, and to give back when I can."

What is the Welfare Officer's place within the Branch or Chapel?

The Welfare Officer is elected annually with all the other Branch or Chapel officers and is a member of the Branch or Chapel committee. You are a key part of the Branch/Chapel and its effective functioning.

- **You hold** an important role and need to attend meetings whenever possible, and be an advocate for the service. This will ensure that welfare issues are properly discussed when considering the Branch or Chapel's plans and strategies.
- **You are** the link between the Branch/Chapel and NUJ extra in London.
- **You should** also try to participate in relevant training courses and seminars so that you are involved in the Branch/Chapel and up to date with NUJ policies.
- **You are** the person who knows and gives information about NUJ extra activities such as fundraising events that need the support of your Branch or Chapel.

- **You are** accountable to the committee and should make regular reports about your work. The Branch/Chapel needs to be aware of issues affecting their members that could be relevant to establishing bargaining priorities with employers. Be careful not to involve any confidential information which could reveal members' names or their situations.

We will look at confidentiality in more detail in Section 6.



- **The NUJ** may be the principal funding source for NUJ extra, but once again we stress that the union and charity are separate bodies. For legal reasons, it is imperative that NUJ extra avoids political activity of any kind (or, only where it is appropriate and endorsed by the charity's board of trustees)
- **You should be supported** by your Branch/Chapel in receiving training and attending courses. The role of Welfare Officer should be seen as beneficial to the employer in helping its workers.

Before turning to the checklists at the end of this section, take a moment to be inspired by Mary's thoughts on what it means and what it takes to be an effective Branch Welfare Officer.

Be inspired

Working together – Supporting members.

Branch Welfare Officer Mary Walsh describes her role.



My name is Mary Walsh, Welfare Officer for the Manchester and Salford Chapter of the NUJ.

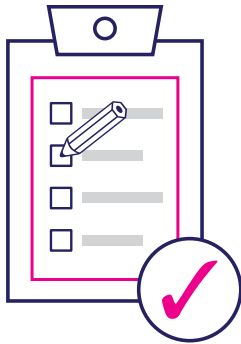
I have been the Welfare Officer for almost two years, where I have been in a privileged position to provide assistance to any of our members who

have found themselves in need from a variety of causes and circumstances.

My other, non-NUJ roles have assisted me greatly in this role, which suits me as I like to help people where I am able. These previous roles also help me get to the nugget of the situation and ask the hard questions that may need to be asked in order to obtain the best and fullest amount possible to both assist that person and protect NUJ extra.

I have found giving this help and being there for people really fulfilling.

Mary Walsh



Checklist 1

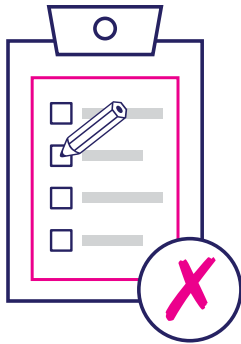
What does your role as a Welfare Officer involve?

- **You are** a link between members, your Branch or Chapel and NUJ extra.
- **You are** a representative of NUJ extra and an advocate for the service.
- **You are** the designated person in your Branch or Chapel to help members get the advice and assistance they need.
- **You are** the sign-poster for members to ensure they get appropriate help.
- **You can provide members with** application forms. If a member needs help in filling in the form, you can either help them yourself or suggest they contact head office. The form is available at:

<https://www.nuj.org.uk/about-us/nuj-charities/nuj-extra/application-form.html>



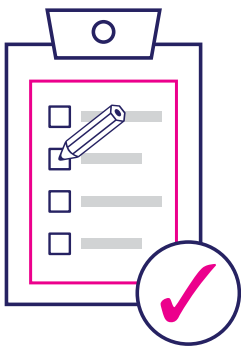
- **You can give** information about the services which NUJ extra offers to the member or their family.
- **You are a recruiter.** The more you tell people about us, the more our services will be used and the more the NUJ's membership will grow in strength.
- **A good** Branch or Chapel Welfare Officer knows their limits, understands and respects the need for confidentiality, and asks NUJ extra for assistance when necessary.
- **You hold** a unique role in the NUJ as you are both an officer for the union and a volunteer for the charity. This is a dual role and it is essential that both structures' needs and regulations are met.



Checklist 2

What does your role as a Welfare Officer not involve?

- ◆ **You are not** a counsellor able to deal with situations that require psychological support.
- ◆ **You are not** an expert in benefits or debt advice who can give full advice.
- ◆ **You are not** a medical expert who can offer medical advice.
- ◆ **You are not** expected to know about how to manage situations you are not trained professionally to deal with.
- ◆ **You are not** a home visitor – NUJ extra does not offer this service.
- ◆ **You are not** the decision-maker about who gets financial assistance, so you must not make any promises.
- ◆ **You are not** expected to be available 24/7. NUJ extra is not an emergency service. There will always be situations that are more appropriately dealt with by organisations set up to deal with crises.





Checklist 3

Your role in the Branch or Chapel.

- ◆ **You are** a committee officer elected annually alongside all the other elected officers.
- ◆ **You** hold an important role and need to attend committee meetings, be an advocate for the charity and report back on your work to the Branch or Chapel.
- ◆ **You are** the link between the Branch or Chapel and head office, and need to maintain this through attending training and other events.
- ◆ **You are** the person who holds the information needed for members in times of personal difficulty.
- ◆ **You are** the person who knows and gives information about NUJ extra activities such as fundraising events that need the support of your Branch or Chapel.
- ◆ **You are** the person responsible for ensuring NUJ extra services are properly promoted so that members are fully aware of the help available.

Section 5

Getting started.

- 
-  **22** A place to work.
Handover.
Training.
 - 23** Introduce yourself.
Facility time for Welfare Officers.
Familiarise yourself with the benefits under your terms and conditions of employment.
Wider benefits of NUJ membership.
Make a plan!
 - 24** Action plan example.
 - 25** Checklist.

Contents 

A place to work

You must deal with a few practicalities in the early days of your new role. Setting yourself up with a good working environment will give you confidence and allow you to give the best possible help to fellow members.

Make sure you have an appropriate place to work, taking into account:

- *You need some office space where you can meet members or have a private telephone call. This may be in an NUJ office or at your place of work.*
- *Many members will not find it easy to get to see you so a lot of your communication will be on the telephone or by email. You will still need a quiet, private space to have these conversations.*
- *It is essential to meet members in public, and to avoid going to their homes. You may have a meeting space for only a few hours a week, so plan your appointments for that time.*
- *Create a quiet, supportive environment that is comfortable for you and them to talk.*
- *Have access to a computer, paper, telephone, space to keep resources, and a locked cupboard for notes and application forms.*
- *Make sure your emails are kept in a confidential file. Reply to them when no-one else can read them. Check with the member whether they prefer to use a home or work email address.*
- *You may have to keep some documents at home if there is nowhere else safe to keep them.*
- *Always ensure that any documents kept at home are stored securely.*

Handover

Ideally, the previous Welfare Officer will be able to hand over to you all existing materials and any on-going cases, and go through their filing system and any list of contacts and external support organisations that they have established. It is your responsibility to ensure this changeover takes place efficiently and that you know where all old files are located. Have a meeting (and take notes), and/or get them to write a handover document.

Talk about the following:

- *Any problems they faced in the role, and how they tackled them.*
- *Where any NUJ extra materials are stored.*
- *Which managers you will need to work with, and information on any relevant agreements such as facility time.*
- *Any welfare events they organised, and what worked well.*

Training

When you become a Welfare Officer, NUJ extra will contact you with details of any training sessions and briefings it organises.

Of course, reading through and regularly referring to these guidelines will give you much of the essential information you need on a day-to-day basis.

“Thank you for the grant again this year. It’s a vital support and allows my Mother-in-Law to live independently in an assisted living environment.”

Introduce yourself

Introducing yourself to key staff and Branch or Chapel reps whom you may encounter in your role is a good way of getting yourself known. A friendly email will get things off to a good start. It could cover matters such as:

- *What your role is in supporting NUJ members.*
- *What you can do for them.*
- *Suggestions for working together.*
- *Offering to attend any wellbeing events that the employer might be organising, to highlight the support available from NUJ extra.*
- *Any training you'll be undertaking, and what it entails.*
- *Your availability to meet up.*

Facility time for Welfare Officers

To fulfil the role properly, you need to have appropriate time to devote to it. You may not get any 'facility time'. If you do, it may not be as much as you would like right away. The process of negotiating this with your employer can be lengthy and ongoing. Your lead fellow reps and National Organiser with responsibility for your Branch or Chapel can support you in these discussions. However, if you've already sent an email introducing yourself, this may pave the way for a positive outcome.

- *Explain your new role to your employer and the benefits which NUJ extra brings to both the individual and the organisation.*
- *Negotiate with your employer for some space at work to meet people, and some time to do your job as a Welfare Officer.*
- *The more the employer sees that NUJ extra helps to keep people at work, the more likely they may be to give you facility time.*
- *Being a Welfare Officer is a voluntary role, and you will have limited time to spend on it. This is normal. If you cannot give the member enough time, that is fine – as long as you pass the case to NUJ extra at Headland House. The member must be helped in a timely fashion.*

Familiarise yourself with the benefits that come within your terms and conditions of employment

It's important to familiarise yourself with any benefits that your members can access via their employer.

For example, some employers now offer a range of health and wellbeing services under what is commonly referred to as an Employee Assistance Programme [EAP]. Counselling, health checks/screening, staff loans and advances on salary are typical of many such schemes, so it's important that you have an easy-to-find list of the employment benefits to which members have access.

Wider benefits of NUJ membership

- *Also, find out about all the other benefits of NUJ membership that may be useful in your role, such as Legal services*
- *Promoting health and safety best practice*
- *Running campaigns against bullying and harassment*

TIP



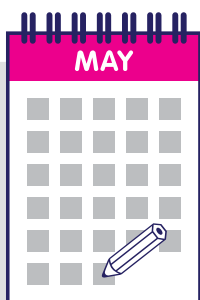
You do not need to memorise details of other organisations. You just need to know that these services exist, and where to find the relevant information.

Some useful contacts are listed on our website at <https://www.nuj.org.uk/about-us/nuj-charities/nuj-extra/links.html>



Finally, having a plan will make life much easier. After you've read these guidelines, make a list of everything you want to do. You can build a rough time plan for the next three months or the whole year. Most importantly, be realistic. Don't make your list so long that it's unachievable. A step-by-step approach, which focuses on ensuring members are aware of the help and support available through NUJ extra, is a good starting point.

To help you get started, on the next page we have put together a suggested 'Action Plan'.



Action Plan

Example

FIRST MONTH

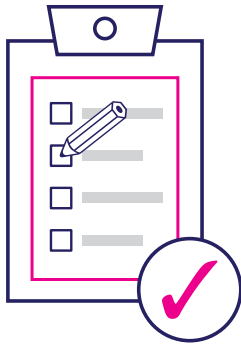
- ▶ Establish an appropriate space to meet members, make phone calls and store information securely.
- ▶ Make sure the NUJ Membership section at Headland House knows your details. You should be recorded on the NUJ database as a Welfare Officer. Also, check you have given the appropriate permissions to receive information. Otherwise, nothing we send via email will reach you.
- ▶ Check the NUJ extra section of the NUJ website to see what resources are available..
- ▶ Find out dates of Branch/Chapel meetings and ask for NUJ extra to be on the agenda when necessary.
- ▶ Find out information on national events, e.g. Delegate Meeting and fundraising events, so you can discuss these with your Branch/Chapel.

SECOND MONTH

- ▶ Go to a Branch/Chapel meeting and tell them about your role.
- ▶ Start to develop a local resource list.
- ▶ Let members know you are available to them, and what you can offer.
- ▶ Advertise NUJ extra in any Branch/Chapel newsletters, and put up posters on staff notice-boards.
- ▶ Ensure reps know how to contact you.

THIRD MONTH

- ▶ Keep an up-to-date record of contact with members.
- ▶ Attend Branch/Chapel meetings.
- ▶ Keep resources up to date.



Checklist

Getting started.

- Do you have a quiet and discreet place to meet members and to do your welfare work?
- Do you have a phone so members can call you and leave messages?
- Do you have secure storage and shelf space for any reference materials?
- Have you worked out how much time you need to give to your new role?
- Do you have access to a computer?
- Have you ensured you have all existing material and files?
- Have you familiarised yourself with any ongoing cases?
- Have you got a clear and simple system of filing?
- Have you spoken with your employer about your new role?
- Have you spoken with your predecessor as Welfare Officer?
- Have you made contact with NUJ extra at Headland House?
- Have you familiarised yourself with any benefits/welfare services offered by your employer, and the wider benefits of NUJ membership?
- Is information now coming to you as the named Welfare Officer?
- Remember, you need to get your Branch/Chapel to contact the membership department to record you on the NUJ database as its Welfare Officer. Also, check you have given the appropriate permissions to receive information from the NUJ.
- Have you found out when and where there are any training sessions or seminars you can attend?
- Do your Branch/Chapel reps and officers know about your new role?

Section 6

Good practice.

- 
-  **27** Confidentiality.
 - 29** Personal safety.
Insurance.
Equal opportunities.
 - 30** Feedback.
Knowing your boundaries.
Support.
 - 31** Expenses.
Branch welfare funds.
Managing the role – job-sharing.
 - 32** Record sheets.
 - 34** Checklists.

[Contents](#) 

In this section, we will look in detail at various practical issues around the Welfare Officer's role. This section contains valuable guidance on how to get the most out of your new role, how to operate safely, and who can help you with any difficulties.

Confidentiality

The principles underlying our position on confidentiality are:

- Confidentiality is a vital part of our service.
- Members are entitled to have their contact with NUJ extra treated with respect and in confidence.
- Under the General Data Protection Regulations [GDPR], members have the right to know what information is held about them, to access any records kept about them, to change information that they believe to be inaccurate, and to know why you are seeking information – and what it will be used for.
- Without assurances of confidentiality, members may be reluctant to provide information or to make contact at all, which will restrict our ability to deliver appropriate and effective services.

Clearly, you may need to refer to Headland House about enquiries and cases, and you may occasionally be absent and need to have temporary cover. For these reasons, confidentiality is maintained within the organisation rather than with individual Welfare Officers.

Notes & record keeping

Good record keeping is very important. It helps you keep track of the cases you are dealing with; it can help NUJ extra monitor and evaluate the service we provide; and it may be important in any complaints procedures, e.g. about a decision on an application.

- Notes about most enquiries should be made and filed.

A Report Record template is included at the end of this section.



- Keeping a record of all issues raised allows you to summarise the sorts of help you have been able to provide to members, when making a report to your Branch/Chapel committee.
- Members whom you meet in your role as a Welfare Officer should be informed that any notes you make will remain confidential.
- You should tell them that these notes are kept for internal use and follow-up, for statistical purposes, and to allow you to keep track of different cases.
- All confidential notes and files will be destroyed after a set time.

TIP



Keep a record of who has spoken to you, and what kind of help they asked for.

A template form for recording notes of meetings with members can be found at the end of this section.

You should make clear

five key points

to any member enquiring about our confidentiality standards.

1. Any information they give remains confidential within NUJ extra. No information will be passed to any third parties or other NUJ members without their permission. If you think they or someone else is in danger, you must tell the individual that you are going to contact Head Office.
2. If information is passed to an agreed external agency, it will be on a “need to know” basis.
3. Data is handled in a way that is consistent with GDPR.
4. Information will not be discussed within the Branch/Chapel, at any meeting, or with other officers other than with the member’s permission.
5. The NUJ extra privacy policy is available at <https://www.nuj.org.uk/resource/nuj-extra-privacy-policy.html>



Storage & access

Any document containing personal information should always be treated as confidential. All confidential information should be stored securely.

This means keeping physical records locked securely and making sure that access to them is limited to yourself or the person who assists you in your role.

Use your common sense. Don’t leave documents lying open on your desk or where others could read them.

With information on a computer, this means ensuring that it can be accessed only by a password and that information is not left visible to others on a monitor screen.

Destroying records

Your records should include all information about a case up until the point when a decision has been made, and notification received from Head Office that the file has been closed. At that point, a summary should be made of the assistance, advice or referral given, and the record form completed. All paperwork and online files must then be destroyed. Ideally, you should use a shredder or other secure means of destroying documents.

Contact Head Office if you don’t have access to a safe means of destroying records.

You should make clear to anyone you are helping to apply for financial assistance that the form will be read only by yourself and the staff at NUJ extra. Remember also that applicants have the right to read any information that you might add.

It is very important that an applicant should give written authority if they wish to allow NUJ extra to contact other charities or external agencies which may be able to provide assistance. You should make clear to applicants that, in these circumstances, only relevant information will be given, on a ‘need to know’ basis.

Conversation & discussion

It is essential that you do not discuss real cases casually with people outside NUJ extra, even with someone you think has no connection to the workplace. Even if you change names or certain details, someone listening to your conversation may be able to identify the people concerned, particularly if they happen to be connected to the situation in some way. It is also amazing how quickly talk can spread and get back to the people concerned.

You may sometimes want to talk about a case in order to publicise your role and the services of NUJ extra. In such a situation, you should be extremely careful not to mention any names or personal details and to modify the material so that it cannot be traced to any individual member.

Everyone has days when they feel exhausted or frustrated, and everyone can feel the need to release their stresses by talking to someone. This is fine, so long as the process of letting off steam does not lead to letting slip confidential information.

We recognise that the essential, front-line role you perform as a Branch Welfare Officer requires opportunities to talk and reflect on the work you do.

TIP



The NUJ extra team is always here to discuss a case and provide support to help you keep in perspective any difficulties you face.

Emergencies

The only situation in which NUJ extra would consider giving information to another organisation is when the member or a dependant is in immediate personal danger, for example where a member may be expressing suicidal thoughts or feelings. Breaking confidentiality is a very serious matter and all possible consequences must be taken into account before taking this step. NUJ extra will always first encourage the individual to contact third parties themselves, or to give us explicit permission to do so on their behalf. For further information, Welfare Officers should keep a copy of our privacy policy, which is available on request or to download.

NUJ extra exists to help applicants with practical matters. While Welfare Officers or Head Office may be able to help with signposting for emotional and mental health issues, it is not the remit of NUJ extra to try to resolve these matters directly.

Personal safety

It is important both for you and the member, who may be in a vulnerable state, that strict procedures are followed in order to ensure everyone's safety. It is essential that you keep yourself safe at all times.

- *Do not visit members at home. If you think a home visit is needed, always ask someone at Head Office before you go. They may help you find a different way to manage the case.*
- *Make sure your meetings are in a public/work space and that you are not left alone in a building with someone.*
- *Do not arrange interviews outside NUJ extra office hours [0830 – 1630, Monday to Thursday. Please ring Headland House reception if an emergency occurs outside these hours].*
- *Agree in advance with the member when the meeting will end.*
- *Always tell someone else where you are going to meet and when you expect to return.*

- *Have a method of communication to hand, e.g. a mobile phone.*
- *Follow your instincts. Leave if you do not feel things are quite right, or if you do not feel in control of the situation.*

Even at your union premises or your workplace, consider your security. In any situation, your own safety should always come first.

Insurance

In order to be covered by the NUJ's personal liability insurance, you must follow the rules for:

- *Personal safety*
- *Confidentiality*
- *Advice giving*
- *Note and record taking*

Equal opportunities

NUJ extra is committed to offering an equal opportunities service that does not discriminate on grounds of race, religion, gender, age or disability. As a Branch/Chapel Welfare Officer, you need to recognise that you may not feel a personal liking for every member you meet. Likewise, some members may be uneasy with you or take against you for no apparent reason. You must not let this interfere with your professional handling of their case. You must be compassionate and patient, and try to understand and help all members.

Some members may prefer to talk to someone other than you. For example, they may be uncomfortable talking to someone of a different gender about health issues or domestic violence. It is important that you do not take this personally.

If a member wishes to deal with someone else, you must respect their wishes. Talk to Head Office; you may have a colleague who can take your place, or there may be a more suitable external agency. For example, in a case involving sexual assault, a referral to a rape crisis centre would be the best way to provide expert counselling and advice to a member who may be reluctant to discuss their situation.

Your Branch or Chapel colleagues will need to establish how to deal with instances like these. You may have colleagues who will take your place, for example a young members officer, LGBT+ officer, disabled members officer, retired members officer, etc. This will ensure all members can access our services in whatever way feels most comfortable for them.

Feedback

There may be times when members are unhappy about the help they've received, or perhaps you are dissatisfied with the service or support that's been offered. While complaints are rare, we are committed to providing a quality service and recognise that we occasionally get things wrong.

In such instances, our first step is to try to resolve the issue informally. However, if we can't do this, there is a feedback procedure in place which can be viewed on our website. Please note that there is no appeal over the grant decisions of the trustees.

Knowing your boundaries

Objectivity and detachment are valuable to any Welfare Officer. Being able to set boundaries so that you can maintain proper relationships – friendly yet professional, with a degree of distance – will help both you and the member in the longer run. It can be easy to get over-involved with other people and their problems, particularly when those problems are deep-seated and complex. Getting so tied up in members' lives that they feel they cannot make decisions without your help may increase their feelings of powerlessness. It is important for the member and for you not to become over-involved. Sometimes, the best you can do is help make the situation clearer. You will not be able to solve the problem every time. Keeping a sense of what is practical is healthy – sometimes you can only help people live with what they have got. Make sure you leave behind the problems and the members with whom you are dealing when you step out of your role as Welfare Officer. If you can do this, you will be a more effective helper as a result.

TIP



Where a member feels particularly uncomfortable about a Branch/Chapel rep knowing their personal circumstances, alternative arrangements can be put in place such as inviting the member to apply directly to NUJ extra, or asking another volunteer unconnected with the Branch/Chapel to assist the member with their application.

Support

Working with other people and the problems that they face can be rewarding and empowering. But there will be occasional days when it can also be exhausting or worrying. In order to stay positive about the valuable work that you do as a Welfare Officer, it is best to have a support system to enable you to keep the issues and stresses you face in perspective. It's important that you do not carry other people's problems or worries and that you limit the extent to which you become personally involved.

- *Find someone you can talk to about the stresses and strains without disclosing personal information. You can do this by calling Head Office.*
- *Getting to know other Welfare Officers is a great way to build up a support group of people who know the kinds of issues and situations that you face.*
- *Welfare training is a good place to share your experiences and stresses, develop new techniques, and give and receive support.*

TIP



NUJ extra recognises that Welfare Officers need to have time and space to think and talk about how they feel, and to be able to reflect on the cases in hand. NUJ extra in Head Office is available if you ever want to talk over a case or its repercussions

Expenses

Your Branch/Chapel and NUJ extra has an expenses system. The Branch/Chapel will pay for your travel and any out-of-pocket expenses relating to your role.

Branch welfare funds

This is not the same as NUJ extra financial assistance. Financial assistance for members must come from NUJ extra, not the Branch.

Branches need only small funds for additional items such as flowers or tokens to members when they are unwell or bereaved. Branch funds must not be used for financial support.

Managing the role – job-sharing

Welfare officer is an ideal role to be undertaken as a job-share. This is particularly helpful in large Branches and Chapels, and/or where there are numerous employers or work sites, and/or where people are working a shift system. This will enable members to access a Welfare Officer more easily.

Some Welfare Officers may be more interested in a particular part of the role. A job-share is a good way to divide the role. It is important that you feel comfortable as a Welfare Officer, and that you undertake the parts of the role that suit your skills.

A useful way to involve other members in NUJ extra activities is to have other welfare contacts in the Branch or Chapel who can help you with some of your tasks, learn the role, be there when you are away, and be ready to take over if you choose to step down.



Confidential

Interview Record Sheet.

Member's Name:

Welfare Officer:

Date:

Meeting Notes:

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.....
.....
.....
.....

Agreed action plan:

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.....
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.....
.....
.....

Follow up:

.....
.....
.....
.....

NOTE: *This record should be stored securely and retained no longer than is necessary. Always use a secure method when destroying any records that contain personal information.*

Complete this form each time a member makes contact. The information will help when reporting to the Branch or Chapel on cases you've handled. Destroy the form when a case has been decided.

Record Keeping

Activity in the Branch/Chapel.

Date	Reason for contacting Welfare Officer and how contact was made	Action taken	Outcome	Date Closed
	<i>e.g. by phone, email, in person, referral, from publicity material</i>			



Checklist

Confidentiality.

- ◆ Do you have lockable storage space?
- ◆ Have you left any physical files, paperwork or computer records on view?
- ◆ Are you alerting all applicants for financial assistance to the relevant statements on Data Protection?
- ◆ Are you checking with all applicants about any potentially sensitive information that is included on the application form or that will be in your report?
- ◆ After NUJ extra has dealt with an application, have you made a summary and securely destroyed any copies of the form or supporting paperwork in your possession?
- ◆ Do you have access to a shredder or other secure means of destroying documents?
- ◆ Have you made sure not to discuss cases with anyone outside NUJ extra, other than where the member has given permission for you to do so?
- ◆ Have you read and understood the NUJ's policy on privacy?
(Note: as all policies are subject to review, you should periodically check on our website to see you hold the latest version).





Checklist

Knowing your boundaries.

- ♥ Know when and where you are going to make yourself available to members e.g. weekly, drop-in sessions, fixed days/certain times of the day.
- ♥ Know how much time you are going to dedicate to one member or each meeting, e.g. maximum of one hour per meeting. To manage members' expectations, let them know how long the meeting will last and when there are 10 minutes remaining. This will allow you time to round up the meeting and end the conversation at a suitable point.
- ♥ Know when to refer the member to someone else, e.g. signpost for more expert information or, when you lack sufficient time because of work pressures, you can refer to Head Office. Do this as soon as possible.
- ♥ Consider making a separate Branch/Chapel Welfare Officer email account to avoid members contacting your personal or work email account on welfare-related matters. Check this frequently, and make sure your Branch or Chapel is aware you have done this.
- ♥ You should also set up an automated reply message that tells the recipient:
 - *Your general availability.*
 - *How soon they can expect to hear back from you.*
 - *If it's urgent, who else they can contact, e.g. Head Office.*
 - *If you're away on holiday, the earliest date that you will read their email.*
- ♥ Ask if your Branch/Chapel can provide a dedicated phone for use in your Welfare Officer role. Ensure your answer-phone message tells members:
 - *How soon they can expect to hear back from you.*
 - *If it's urgent, who else they can contact, e.g. Head Office.*
 - *If you're away on holiday, how soon you will read their email.*
- ♥ Don't discuss your personal life experiences when talking to a member in your role as a Welfare Officer.
- ♥ Meet members in a neutral, accessible and private space, such as a trade union meeting room or cafe. Do not meet members in their or your home.
- ♥ Be aware of your personal safety. Always tell someone where you are going to meet a member, and when you expect to return.
- ♥ Follow your instincts and leave a meeting if you think things are not quite right, or you do not feel in control of the situation.

Section 7

Our services & managing enquiries.

- 
-  37 Eligibility.
Our services.
 - 38 Listening and Support.
Other services.
 - 39 Handling enquiries.
Flowchart.

Contents 

In this section, we look at the services we offer, how you will manage enquiries, and whom we can help.

Eligibility

Our aim is to help members of the NUJ who, because of sickness, accident or other unforeseen circumstances, need short-term financial assistance. We cannot aid members who, in the long-term, find it difficult to make a living from journalism. In such circumstance, we recommend they seek alternative work.

We may help:

Current full members of the NUJ.

Former full members of the NUJ who resigned from the union when they retired or left journalism, for example.

Dependants of deceased NUJ members, such as widows and orphans.

There are some restrictions:

We may help only full members of the NUJ. We cannot assist anyone who is a temporary, student or asylum seeker member.

Full members must have paid at least one year's contributions to the NUJ.

For past members, we must have proof, via the NUJ's records or documentary evidence (old NUJ membership cards, NUJ life membership cards), that the person was a member of the NUJ who had paid their contributions regularly.

We do not normally assist lapsed members, unless you can provide a reason that satisfies the trustees.

We help current members facing short-term difficulties only. We cannot subsidise those who are unable to make a living as a journalist.

Our services

Financial assistance

We provide short-term financial assistance to act as a safety net for members and their dependents who are facing unforeseen hardship according to our criteria.

We explore this in more detail in Section 9, where you will find comprehensive information about how to access financial support, the application process and how applications are assessed.



Paying bills

For members and former members facing hardship, we concentrate on settling the debts that could lead to court cases or homelessness. So, we will pay rent and mortgages sooner than store card bills, for example. It is our policy, when helping with bills or payments for rent, to try to pay the grant direct to the supplier or landlord. We send money to individuals more rarely.

We are happy to consider requests for help in purchasing medical equipment such as wheelchairs or to pay for minor home adaptations, but we rarely replace computers or cameras. We advise you to make sure your equipment is adequately insured against loss.

Credit cards and major debts

Falling into debt or struggling to meet debt repayments can often happen when circumstances change. People may rely on borrowing money to make ends meet. This can become a problem when it is no longer affordable and other essential costs become difficult to meet. When supporting members in this situation, you may find that the true picture of their finances does not emerge straight away. It may take a few discussions before you know the full details – this is not because the person is trying to hide things or be dishonest.

Usually, it's because they have not allowed themselves to think about the whole picture because this could be too distressing. Ensuring your member is signposted to expert advice is critical, as professional debt advisers are skilled in teasing out all the relevant information and exploring the various options that may help in resolving the problem.

Many applications received are for assistance with large credit card or other debts. We understand that many people use credit when their circumstances take a turn for the worse. However, although we will assist members with utility bills or similar, we cannot use charitable funds to pay off credit card or other large debts. We do advise credit counselling, perhaps with the member coming to an agreement with creditors or declaring themselves bankrupt.

Full members are entitled to a 30-minute phone call with Thompsons Solicitors on debt advice. Details are at <https://www.nuj.org.uk/resource/free-legal-advice-scheme-form.html>



All applicants must complete an application form and give as much information as possible about income and reserves. We believe our charitable funds should not be used to replace state benefits, so applicants must claim all state benefits to which they are entitled.

What we do not do

We do not pay solicitors' fees or other legal bills. We do not pay for private medicine or private education and would not normally consider someone paying for these to be in need of our help.

Signposting and referral

Another very important part of our service is to offer advice about external organisations and agencies. Knowledge about the appropriate agencies in your area will make you a vital resource for your members.

Similarly, an awareness of the types of statutory benefits available, as well as those provided through the local authority in the area where the member lives, will mean you can refer members directly to the right place for specific help.

NUJ extra has produced a directory of useful organisations to help you in your role.

It may be found at

<https://www.nuj.org.uk/about-us/nuj-charities/nuj-extra/links.html>



Being a signposter is one of the most important parts of a Welfare Officer's role. You are not expected to know how to solve problems, or to be able to offer specific advice, but knowing where to direct the member is an invaluable service.

TIP



Here are some suggestions on what to say to your employer:

"Working together, we can help reduce absenteeism or help you meet your duty of care to staff"

"In the current economic climate and times of uncertainty, NUJ extra provides services that can help staff to cope and therefore enable them to concentrate on their job"

"Can we promote the service at staff induction days and reference it in the staff handbook?"

"Can we include information about NUJ extra on staff payslips?"

Listening and support

One of the most important ways we help is by being a listening ear for someone. Often, just sharing a problem makes all the difference.

Remember, we offer a confidential service within the organisation and will contact others for advice only with the member's agreement.

The NUJ extra team is here both to support members directly, and to offer you advice and support in relation to your role as a Welfare Officer.

Other services

There are many online benefits calculators, which may help members. Two of the more widely used are operated by the UK government, at

<https://www.gov.uk/benefits-calculators>



and by the UNISON union at

<https://www.unison.org.uk/get-help/services-support/there-for-you/tax-credits-and-universal-credit/>



Following up

Keeping in touch by checking in with the member that they are receiving appropriate help is a vital part of your role. By doing this, you are better placed to decide if and when an application for financial assistance might be appropriate. For example, in this case, it might be that the member has ignored warnings to pay their council tax, so an application for financial assistance might need to be made at the same time.

The case studies in Section 10 illustrate some of the typical kinds of issues that you might encounter.



Handling enquiries

Understanding the type of enquiries you may encounter

As a Welfare Officer, you will be asked by members for help with a variety of problems. In many cases, getting the right information from the person making an enquiry isn't straightforward. Sometimes, the problem that is presented initially is not the issue that needs work. For example, a member may tell you first that they are in financial difficulties, but a gambling habit that has spiralled out of control could be the root of the problem.

Researching what can be done, and referring on

You are not expected to be an expert on everything yourself. In many cases, the best thing you can do is to signpost the member to a suitable source of further help or information. For instance, using the example above, finding appropriate assistance by referral to a relevant organisation to help with gambling or stress management could deal with the cause of the member's financial difficulties.

Handling enquiries flowchart



You can see from the following flowchart that not every approach to you will result in an application to NUJ extra for financial assistance.

Here is a typical pattern of the help you may give.



Section 8

Communication & interviewing skills.

- 
-  41 Managing the initial enquiry.
How might the member be feeling?
Arranging and preparing to meet.
 - 43 Interview process.
 - 45 Referring members on.
Communication.
 - 48 Interview checklist.
 - 49 Questions.

Contents 

In this section, we look in detail at the interview process and the skills and techniques that make for effective communication. For many members who seek our help, talking about their problems is difficult and a first meeting can be stressful.

This section is intended to give you an understanding of the best way to conduct interviews so as to make them comfortable and effective. We will look at the practicalities of arranging a meeting and at the communication and listening skills you will need to develop. There is a checklist at the end of this section to help you understand the best way to go about meeting and talking to members in need of support.

Managing the initial enquiry

When a member first makes contact, it may be for any number of reasons. They may:

- *Immediately enquire about the possibility of financial assistance, without making clear their situation.*
- *Enquire in broad terms about advice on an issue without raising the possibility of financial assistance.*
- *Overwhelm you with too much information.*
- *Be guarded and difficult to draw out.*

At this first stage of an enquiry, the complexities of a case may not be clear, and members may be initially reluctant to reveal all the issues involved. While you may naturally be interested and concerned to know more, you should be careful not to be too inquisitive as this might intimidate or embarrass members. Your role may simply be to listen.

The key things to make clear at this stage are:

- *That NUJ extra is a confidential service.*
- *That you would be happy to research the issue and look for other organisations that might be useful to them, or refer them or their enquiry to Head Office where appropriate.*
- *Suggest that if they are interested in the possibility of financial assistance, you could arrange an interview (either in person or on the phone; see below). You should make clear that the process will also involve exploring other help that may be available, for example benefits or expert advice from another organisation.*
- *If they are enquiring about the possibility of financial assistance, you should make clear that it could be offered only if no other form of financial assistance is available (see section 9 on criteria for financial assistance).*

Start on the right footing

Many cases will require more than one meeting or contact with a member. At the initial enquiry, you will largely just be getting to know the member and putting them at ease as they describe their situation or problem.

Starting on the right footing from the outset of every case is very important, as it will tend to set the tone for any subsequent meetings. This means maintaining a non-judgmental attitude, listening well and making supportive suggestions as to how and where members might gain advice and assistance. It also means not raising unrealistic expectations about how we can help.

How might the member be feeling?

When preparing to meet a member, you should always try to put yourself in their shoes and consider how they might be feeling. If they have approached us for help, they will almost certainly be anxious about their situation. On top of this, most members will naturally be nervous or wary about discussing their problems. For many members, just admitting to someone else that there is a problem will be a big step.

Instead of dealing with a problem straight away, people often let it grow into a crisis because they are worried by what other people will think and say about them. It is vital not to discourage a member who has worked up the courage to seek help with their problems by sounding judgmental or disapproving.

Arranging and preparing to meet

It is important that you meet members in the right kind of environment. If you can, find and reserve a room with enough space and which is quiet and private for a couple of hours. You should try to avoid meeting for more than an hour. You can use the extra time to make notes or complete any paperwork, and to gather your thoughts.

Preparation

You should always be fully prepared when meeting a member. This means:

- *Reading all relevant details and information about an ongoing case.*
- *Looking up a member's case history if they have used the service previously (you can check this with Head Office).*
- *Researching a subject that you already know to be relevant to the case, so you can have useful information to hand.*
- *Preparing general resources for the meeting, such as: writing equipment, paper, NUJ extra information, details of local agencies, benefit leaflets, tissues, water etc.*
- *Planning some of your questions in advance. You will need to ask certain questions to make sure you fully understand the situation, and to find out whether, for example, the case is suitable for an application for financial assistance or signposting to other organisations, or both.*

Gaining trust and confidence

For an interview to be successful, it is vital to gain the member's trust and to feel confident. It is normal to feel a bit nervous before meeting a member for the first time, particularly if you are new to the role. However, the member will almost certainly be more nervous than you, so it is important to try to relax and make them feel relaxed in turn.

Techniques for relaxing

Take a few deep breaths before you sit down to talk. The best way to relax is often to concentrate fully on helping the other person to feel at ease. This will take the spotlight away from you, and allow you to hide any nerves or tension until you have settled into the discussion proper.

A useful trick is to sit across the corner of a desk or table rather than sitting directly opposite each other. This helps to create a more relaxed, informal atmosphere while still allowing you somewhere to put your documents where you can use them. In this position, you can pay full attention to members without making them feel they are under scrutiny or being tested.

Supporting members by phone

Sometimes, you will have to decide whether to meet a member face-to-face or talk to them on the telephone, depending on which is more convenient for you both.

Telephone interviewing can seem more nerve-racking to some, but it can have advantages over face-to-face meetings – especially as some members may be more comfortable with the anonymity of a phone call than meeting in person.

Advantages of phone calls

- *Quicker, and perhaps a better use of your time.*
- *More convenient and cheaper for you and the member concerned as there are no travel costs.*
- *Better suited to shorter conversations.*
- *Can focus more on your tone of voice and language.*
- *May be a better option if there is no suitable, private place available to meet.*
- *Can be more convenient if you are working from home or at a different location to the member.*
- *Some people find it easier to talk about personal issues over the phone.*
- *If there is information you don't have to hand, it is easier to find it and then call them back.*
- *Easier to take notes whilst listening without putting the member off.*

Disadvantages

- You cannot see the member's facial expressions or body language, so there are fewer clues about how they are feeling.
- Can feel impersonal. Difficult to establish a rapport and let the member open up.
- Some people are not good at, or dislike, talking over the phone.
- Can be difficult to find the right time to call so the conversation remains confidential and the member has no fear of being overheard.
- Can be difficult to refer to your notes and materials as well as listening to the phone.
- It can be more difficult to talk for a long time without seeing the other person, so it can be harder to get the full picture.
- Not possible to show directly the notes made during the interview for the member to agree, so it must be done verbally or by email.
- Application forms cannot be signed, or leaflets handed over.

From the table above, some clear pointers arise for getting the best out of telephone interviews:

- Try to eliminate background noise as far as possible. If it is difficult to hear what is being said, it will be much harder to gain the member's trust.
- Work hard at making your voice sound interested and receptive. Smiling while you talk will make you sound more positive and friendly.
- Even on the phone, keeping your body language alert is important. Try sitting up straight or even standing as this will affect your tone of voice.
- Anything that needs to be agreed must be read out word for word.
- Check more often than you would normally that you fully understand what has been said by summarising the main points.
- To ensure that everything is clearly agreed between you, send an email/letter laying out everything you have just decided together. This will ensure there are no misunderstandings later.

TIP



You should always ask the member which method of interview they would prefer, and try to abide by their wishes.

Keep calls within normal office hours as this will ensure the NUJ extra team is available to contact in the event you have any serious concerns about the person's safety.

Interview process

Interviewing could be described as an exercise in gathering information. All interviews take place so that specific details can be collected. It is very important before going into any interview to decide what information you want to gather.

This point has been widely examined in the past, and a recognised pattern of questions has evolved.

They are known as the Five W's

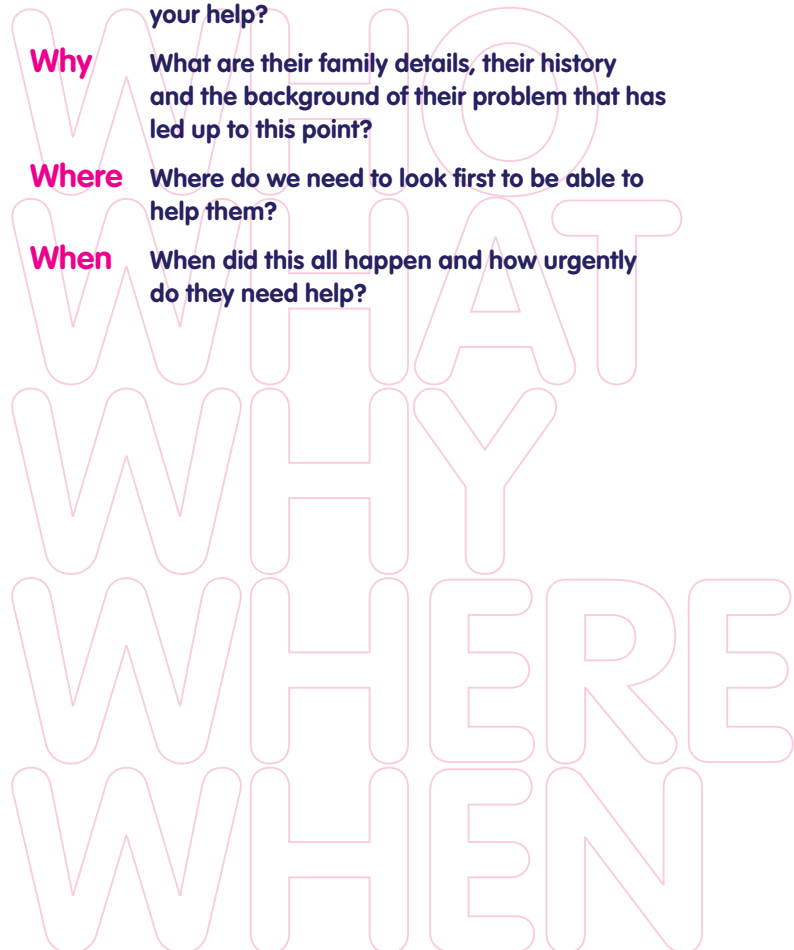
Who The details we need about the person applying

What What is the problem that has led them to seek your help?

Why What are their family details, their history and the background of their problem that has led up to this point?

Where Where do we need to look first to be able to help them?

When When did this all happen and how urgently do they need help?



Supporting members by email

Of course, there will be times when email is the most practical and efficient way of communicating with members, especially if either you or they work shifts. To avoid sending emails that members may perceive to be cold or unfeeling, consider the following:

- *Be mindful of your tone. Unlike with face-to-face meetings, or even phone calls, the member reading your e-mail won't have the benefit of your tone of voice or other non-verbal cues, so attitudes may be misinterpreted. Aim to sound approachable and non-judgmental.*
- *Keep emails brief and to the point. Make your most important point first, then provide detail if necessary. If you make clear at the beginning of the message why you are writing, your member is much more likely to respond. Long emails are often set aside and forgotten.*
- *Read your email before you send it. Our brains work faster than our fingers and it is easy to drop a word or two as we rush to type what we think. It's a good idea to re-read your messages to make sure that what is on the screen matches what you mean to say.*
- *Don't write in CAPITALS. THIS IS THE DIGITAL EQUIVALENT OF SHOUTING!*
- *Use your spelling checker. Misspelt words give an impression of carelessness and are easy to avoid.*
- *Pause before pressing SEND. Check that the email address is correct, you've included your contact details, that the message is marked 'Private & Confidential' and that no one else is likely to receive your email in error.*
- *Reply promptly This shows the member that you care, even if you can't give them exactly what they want.*

Starting the meeting and setting the agenda

The start is possibly the most important stage of the meeting between you and the member. This is your chance to establish a relationship that will be helpful for the way you need to work with this person. It is a good idea to start with small talk, to allow you both to settle and relax. For example:

"How has your journey been here/to work today?"

"Did you have trouble finding the room?"

These are easy, factual questions designed to get the member talking.

Once they are relaxed and settled enough to start the interview, you need to clearly establish what is going to happen and the purpose of the interview. Here is an example:

"I am pleased you were able to come in to see me. This time is for you to tell me about the difficulties you're facing at the moment. I may take notes and ask questions while I'm listening, but this is just to understand fully and so that I remember the key points.

Anything you tell me will be in confidence and if we need to share any of it with anyone else, you'll be fully informed about who, and why it's necessary. However, we'll never speak to anyone without your permission. We have up to (give time) to talk today but we may need to meet again, or speak on the phone or by email, to discuss all the options available. Do let me know if at any stage you don't understand anything or want to ask me a question. If I don't know the answer, I'll let you know and, where possible, try to find the information you need."

Format of the meeting

In order to agree how you are going to work with the member, you need to reach agreement about how you will proceed – a little like having an agenda in a meeting, to ensure you are both talking about the same issues.

The first part of the interview will be to establish why they have sought assistance from NUJ extra. Two examples of the way you could ask this are:

"So, tell me, how do you think I can be of help?"

"Can you tell me about the difficulties you're facing at the moment?"

Taking into account what has been said, the second part will then be a discussion of the options open to the member. You should make clear that:

- *Your role is to discuss all the options and services available to the member and, if an application for financial assistance is appropriate, to help complete the application form if they want assistance.*
- *You are not in a position to give them financial help there and then. Nor are you able to tell them whether NUJ extra will be able to help them in future.*

For example:

“My role is not to give you professional advice or solve your difficulties. I am not in a position to be able either to give you financial help today or even say whether NUJ extra will be able to in future. What we can do is discuss all the possibilities open to you, which could initially mean that I will signpost you to organisations that may be able to help. If an application for financial assistance seems appropriate, we can complete the form together. This may not all happen today. If we run out of time, you can take the form away with you to complete and we’ll get together again to go through everything.”

Action planning

The point of interviewing members is to arrive at some kind of action that will help solve their problems. Being a sympathetic listener is useful, but most people will need a plan of action in order to help themselves. The end of an interview should always focus on what should happen next. This means agreeing the range of options available and any decisions made. The action planned may not always be your preferred solution, but needs to be that which best suits the member.

TIP



NUJ extra tries to encourage members to make choices and act for themselves. You should resist taking on a lot of practical work yourself. Whether that is making telephone calls or writing letters, it is more empowering for members to take action themselves. That way, should the situation arise again, they will understand what needs to be done.

TIP



When making notes of the meeting, you should always write down the agreed actions and confirm with the member. A follow-up email is always helpful.

An interview record template can be found in Section 6 which is also available to download.



Referring members on

If members wish to deal with someone else, you must respect their wishes. Talk to Head Office; you may have a colleague who can take your place or there may be a more suitable external agency. For example, in a case involving domestic abuse, a referral to the National Domestic Abuse Helpline would be a good way to provide expert counselling and advice to a member who might be reluctant to discuss their situation with you.

Communication

Language

Be aware that the language you use reveals a lot about your thinking. Calling an issue “a problem” may be quite off-putting. Sensitive members may assume you think that they are to blame if the issues facing them are labelled in this way, when they may have arisen through circumstances beyond their control. Try to find more neutral words such as “issue”, “the circumstances” or “situation”.

TIP



One helpful tip is to talk about the matter using the same words as those the member uses themselves. Similarly, the word “interview” could make some members feel that you are going to be sitting in judgement on whether they deserve support. So, use less formal words like “let’s meet for a chat and discuss how I might be able to help”.

Non-verbal communication

Non-verbal communication plays a huge part in an interview, since how we say things is often just as important as what we say. In face-to-face communication, your tone of voice, facial expression, gestures and posture will all affect how the listener interprets what you mean, and whether they like or trust you.

Reflecting

A useful technique during a meeting is to reflect back to the member what has been said. A reflection is a brief statement of what you think the member has been saying. It is a bit like holding up a mirror so that they can think about what they have been saying.

A reflection should be offered tentatively. Always ask the member if they agree or disagree with what you have said.

Reflections typically begin with phrases like:

“You seem to be feeling ...”

“It sounds as if you think”

“So what you are saying is”

They're useful because they:

- *Show that you are listening and trying to understand.*
- *Help you to check that you have understood correctly.*
- *Give the member a chance to correct any misunderstanding.*
- *Encourage the member to reflect on what they are saying.*

Summarising

This is similar to reflecting in that it is a statement of what you have understood the member to be saying. A summary is a short overview of what has been said so far, and a way of inserting a mini-conclusion into a discussion. It also allows the member to see how their situation sounds to you. It can let them see more clearly the nature of their problem.

When summarising, you should try to pick out the key points and feed them back in a short, clear statement.

For example:

“It seems your health difficulties have caused unexpected spending and you're feeling worried about how you are going to manage financially.”

Summaries should also be offered tentatively so that they can be corrected and adjusted. They are useful because they:

- *Clarify both for you and the member what the key points are.*
- *Focus the member on certain points.*
- *Confirm that you have understood the overall situation.*
- *Can cut short a member who is going off on a tangent, without you seeming rude or uninterested.*

Challenging sensitively

Sometimes, you may feel that what you are being told isn't quite gelling. You may want to probe the facts a little more deeply in order to check that what you have heard is correct. This is known as 'challenging' and needs to be handled carefully in order not to be seen as threatening.

Challenging should always be done with the intention of being helpful. It can also help the member to recognise inconsistencies in their account that they may not have noticed or admitted to themselves.

For example: *“You say you always pay off your credit cards and yet your debts are mounting. Perhaps you have only been paying off part of the debt each month?”*

Listening

Being a good listener is a skill that all Welfare Officers should cultivate. Listening to the details of what someone is saying, rather than merely getting the gist of it, requires switching to a different frame of mind from everyday chatting. When someone is speaking at length, it can be easy to switch off, to nod mechanically or to repeat a few stock phrases.

Sometimes, we can miss what is being said because we are already thinking about how we'll reply. Developing the ability to concentrate on what people are saying may take time and effort, but it is an invaluable skill that will help you communicate better both as a Welfare Officer and in general.

Here are a few pointers to illustrate what can get in the way of effective listening:

- *Listening with sympathy – This is a common human response, but sympathy can get in the way of you working with someone and identifying the most appropriate next steps.*
- *Interrupting – Interrupting a person who is conveying thoughts and feelings is a common trait in conversations. It arises from enthusiasm, boredom, having something to say ourselves, not being able to wait, emotion or insensitivity toward the person speaking.*
- *Silence – At times, the member may pause or not want to express words. There may be a tendency for you to fill the silence or space with a question or a response. That 'silence' can be precious for the member, and is a non-verbal cue for you to observe without words.*
- *Worrying about your next response – If you are preoccupied, you may stop listening and not be attentive to what the member is saying. The key is to forget about a response and just 'be' with the member using the 'LAW' rule - if in doubt, LISTEN AND WAIT.*

What can I do to help myself listen?

- *Avoid distractions. Concentrate on the member, watch their expressions and movements, stop phone calls, put previous or current work out of view.*
- *Don't assume. You'll never understand what someone is saying if you make assumptions – you'll know only what you knew already.*
- *Stop talking! Listen to the words and the way they are being said. Are there any emotional overtones?*
- *Is there any hesitation? This is just as important as the content.*
- *Ask questions. The only way you can check your understanding is by asking questions.*

Questions

Asking the right kinds of question can make the difference between someone opening up to you and the conversation closing down. You will find that many people are not used to talking about themselves. Often, this can be a factor in their difficulties – for instance, someone in debt not admitting to anyone the amount that they have spent. At the end of this section, you will find guidelines on the types of questions which are helpful, sometimes helpful, or unhelpful.

How much should I be talking?

Probably the most common fault when dealing with an enquiry or conducting an interview is to do too much talking. Again, you should aim to switch to a different frame of mind from everyday conversation where each party will tend to speak for the same amount of time. When a member approaches you, your role in the conversation will mainly be to listen.

You may have a story about your own life which you think relevant or similar to the member's situation, but talking about yourself in this way is not appropriate. Your role is to bring out the member's fullest description of their difficulties so that they can see their situation as clearly as possible.

In general, you should try to give guidance only after the member has fully described their situation and difficulties. Even then, you should continue asking for their opinions rather than focusing on your own experiences.

Reaching agreement and planning action

Just airing a problem with a sympathetic listener may be useful, but most people need a plan of what to do next in order to help themselves. The end of each interview you conduct needs to be focused on what could and will happen next – that is, the options and the agreed decision.

The aim should always be to encourage members to be pro-active... as in choosing what to do and acting for themselves. Avoid taking on a lot of practical work yourself, unless you alone can perform the task. Whether it is making telephone calls or writing letters, it is generally more empowering for members to sort things out for themselves. That way, if the situation should arise again, they will have understood the process and learned what to do.

The Interview Record Sheet in Section 6 has space for 'actions agreed'.



Fill it in with the points agreed and give the sheet to the member, having taken a copy for your records. An electronic version of this template is available to download, making it possible to email to the member.

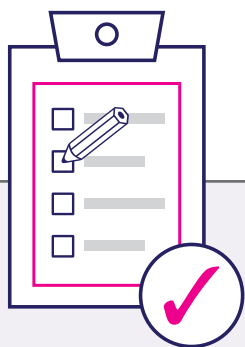
Developing your own style

Everyone develops their own style of interviewing. There is no right or wrong way. We have mentioned it is important that the interviewee feels relaxed. It is equally important that the interviewer feels at ease, as any tension will be apparent to the person being interviewed. That may make them feel uncomfortable or anxious about discussing their personal situation. If you are completely new to interviewing, rest assured you can quickly perfect your style and establish an effective way of managing this important aspect of your role.

TIP



Follow the 70:30 rule.
Let the member talk 70% of the time.



Interview checklist

Preparation

- ◆ Have you checked that the person you're speaking to is a member?
- ◆ Have you read any relevant notes or files?
- ◆ Have you done some initial research, for example; looked for any useful external organisations or agencies that might be of help?
- ◆ Have you decided if a telephone discussion is appropriate or not?
- ◆ Have you arranged for a suitably private room or space to use?
- ◆ Have you got paper, pens, NUJ materials and any relevant leaflets?
- ◆ Have you got some drinking water and tissues?
- ◆ Have you planned in advance some of the questions you want to ask?
- ◆ Have you confirmed arrangements with the member and given some indication about how long this discussion/meeting will take?

Meeting

- ◆ Have you explained NUJ extra's privacy policy?
- ◆ Have you created a relaxed atmosphere and gained the member's trust?
- ◆ Have you agreed an informal agenda of what to discuss with the member?
- ◆ Have you made clear to the member what your role is?
- ◆ Have you asked all the questions that are relevant to an application for financial assistance, if this is the purpose of the meeting?
- ◆ Are you making notes of the key points and information you need to remember?
- ◆ Are you making occasional reflections and summaries?
- ◆ Are you talking too much, and are you listening?
- ◆ Are you being realistic with the member and not raising false hope?
- ◆ Have you agreed an action plan with the member and whether/when you'll meet or talk again?

After the meeting

- ◆ Have you written up and securely filed the notes you made?
- ◆ Have you sent a confirmation email, text or letter confirming what was agreed at the meeting?
- ◆ Have you spoken to or emailed NUJ extra in London, if necessary, about the case?



Questions

Helpful questions.

Open questions:

Invite the member to say freely what is in their mind.

These questions begin with words like

Who, What, Why, Where, When, How...

- *How are you feeling about this situation?*
- *Why do you think that happened?*
- *Can you tell me how all this happened?*
- *What do you think the important issues are here?*
- *What seems to be the priority now?*
- *What advice or help have you received from elsewhere?*

Clarifying questions:

Ask the member to explain more fully what they mean.

- *I'm not quite clear about that; could you explain a bit more?*
- *Did this all occur at one time or was it over many months?*

Linking questions:

Refer to a topic that the member has already spoken about.

- *You mentioned you had a health problem; could you tell me more about that?*

WHO
WHAT
WHY
WHERE
WHEN
HOW



Questions

Sometimes helpful questions.

Hypothetical questions:

These questions ask what would happen if something different were the case. They can be helpful when thinking about how a member would like things to be, what the consequences of a decision might be, and when setting goals.

- *If you could get help with childcare, would you feel able to return to work?*
- *If the employer allowed you to work different hours, might that help?*

Closed questions:

These can be helpful when you are asking someone to confirm a fact and require a “yes” or “no” answer.

- *Can I just check that you said you first went off sick two months ago?*



Questions

Unhelpful questions.

Leading questions:

Contain information or assumptions that can lead the member to give an answer they might not normally give. It can sound like you are trying to put words into their mouth.

- *So you took on extra borrowing. That was a mistake, wasn't it?*



Multiple questions:

This is when you ask several questions in one sentence. This makes it difficult for the member to answer easily, and may confuse matters?

- *Did he reply and what did you do and how was it afterwards with your landlord?*
- *How large is the debt and when is it due and what is it for?*
- *Can I just check that you said you first went off sick two months ago?*

Section 9

Financial assistance.

- 
-  52 Financial assistance.
 - 53 Completing the application form.
 - 54 Members with partners.
The assessment process.
 - 55 How applications are assessed,
and Frequently Asked Questions.
 - 57 Decision & Outcome.
Other Frequently Asked Questions.
 - 58 Checklists.

Contents 

In this section, we look in detail at when it might be appropriate to request financial assistance and how to go about making an application; how we assess requests for financial assistance; and our procedures and processes.

We also take the opportunity to address some frequently asked questions.

Financial assistance

Criteria

NUJ extra is a charity. The decisions it makes about who can receive financial assistance, and the limits for financial assistance, are agreed by the charity's trustees. The broad details are listed below.

The most up-to-date details of the guidelines may be downloaded from the website at <https://www.nuj.org.uk/resource/guidelines-for-nuj-extra-2020-2021.html>



We cannot give money where the request does not meet our criteria, though we may still be able to give advice and support to any member who approaches us.

Before making an application

As a charity, we cannot consider an application for financial assistance where statutory help is available in the form of benefits, or for items which there is a legal requirement on statutory services to fund. This means that, where appropriate, applicants are required to look at maximising their income by applying for any benefits they may be entitled to before a request can be considered. As well as checking eligibility to state benefits, this includes checking any help that might be available through local authority schemes, for example local welfare assistance schemes (England), discretionary support loans or grants (Northern Ireland), the Scottish Welfare Fund (Scotland) or the Discretionary Assistance Fund (Wales).

Please contact the Irish office for details of discretionary grants in the Republic of Ireland.

When is it appropriate to make an application?

Although the NUJ has many members on low pay, or whose usual income leaves them struggling financially, the core criterion for applying to NUJ extra is 'unforeseen hardship'.

For example, job loss, ill health, family breakdown, disability, bereavement, caring for someone – all can lead to a sudden loss of income or increased expenditure, with an enormous impact on personal finances. We are keen to help any member who unexpectedly finds themselves in this type of situation.

Ways we can help

- ◆ Help with living expenses, for example towards rent/mortgage, essential utility bills.
- ◆ Essential items such as household or disability equipment.
- ◆ Help towards property adaptations to meet disability needs.
- ◆ Clothing, for example where there has been weight loss or gain linked to ill-health, or where a child needs clothing for school.
- ◆ Heating/Utility costs where bills are higher than normal due to health or other reasons.
- ◆ Bankruptcy or Debt Relief Order signposting.
- ◆ Assisting with rental deposit – moving home for unavoidable and exceptional reasons, such as domestic violence.
- ◆ Funerals – contribution towards basic costs and where all other help has been explored.
- ◆ Health-related costs – prescriptions, travel to hospital.

Where we can't help

- ◆ Overdrafts, credit card debts or loans – including loans from family and friends.
- ◆ Private medical fees, where state-provided care is available.
- ◆ Educational costs.
- ◆ Legal expenses or fines.
- ◆ Paying for anything that has already been bought or bills that have already been settled, even if the money has been borrowed from elsewhere.
- ◆ Residential or nursing home costs.
- ◆ Purchase of a car/house.
- ◆ Travel abroad.
- ◆ Headstones.
- ◆ Paid deposits on rented accommodation.
- ◆ Financial difficulties that pre-date membership of the NUJ.
- ◆ If the person has run out of money – other than if the circumstances were unforeseen.
- ◆ Hardship that has arisen as a result of taking industrial action.

Completing the application form

You can find the NUJ extra application form at <https://www.nuj.org.uk/about-us/nuj-charities/nuj-extra/application-form.html>



A member may print it and complete it offline, or complete it and send it online.

They may ask you for help, either way.

Every application form for financial assistance must clearly explain:

- *The applicant's financial circumstances.*
- *How their financial situation has changed.*
- *Why these changes are unexpected and could not have been predicted.*
- *What steps they have taken to find alternative help and support.*
- *Health, disability and family issues relevant to the application.*

TIP



Helping members complete the application form is an important part of your role as a Welfare Officer.

If you understand why questions are being asked, you can advise correctly on the completion of the form.

Branch/Chapel Welfare Officer supporting statement and endorsement

As a Welfare Officer, you can provide any additional information to support the application.

If there are any factors that have put an unreasonable strain on the household, or any other information that you think adds to the application, you can explain this in a supporting statement to accompany the application form. You know the member concerned, and the bare details on the application may not make the strongest case.

A well completed form is the most effective way of speeding up the progress of the application – we can handle the case more quickly if we understand all relevant aspects of the member's circumstances.

Look at these two very different uses of a Welfare Officer supporting statement –

Version one states:

"This case is deserving of welfare support."

Version two explains:

"Without the help of funding, I believe this member's already precarious relationship with his partner may falter. They have been under great strain, having to cope with numerous hospital appointments at the same time as experiencing a reduction in their income. The employer is also closely monitoring his sick leave. They are receiving counselling and badly need some practical assistance in the short-term whilst benefit applications are being processed. This will help them face the future together despite the health problems ahead and ensure some of their immediate concerns are alleviated."

Supporting paperwork

All applicants must provide relevant documentary evidence in support of their application, as detailed on the form. Documentation should include bills, quotes, receipts, bank statements and other relevant correspondence as appropriate.

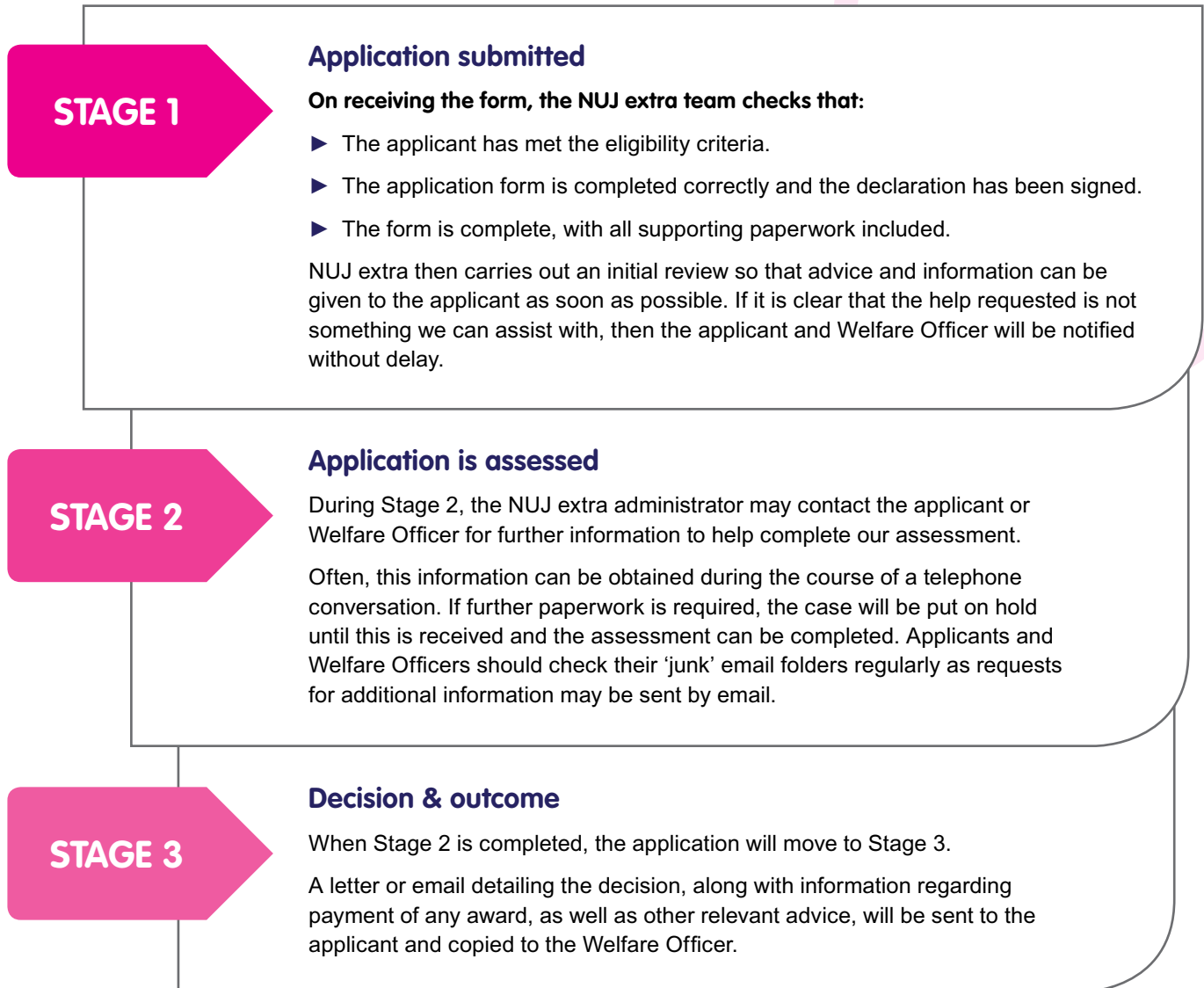
Applicants should attach copies or scans rather than the original documents themselves.

Members with partners

Members who have a spouse or partner must include details of their income when applying. This is because most couples pool their incomes and share expenses. If a member is living as part of a couple but fails to declare this, they are making a fraudulent application.

The assessment process

Assessments follow a 3-stage process as detailed below:



How applications are assessed, and frequently asked questions

Our assessment process is designed to ensure that all applications are looked at consistently, with a particular focus on how well the applicant meets the eligibility criteria.

Six important assessments are made on every application, as described below. Use these as a checklist when:

- a) *Considering whether a member should apply for financial assistance*
- b) *Checking that the application form has been completed in full.*

NOTE: *An application that addresses as many as possible of the 6 assessment points is likely to get a quicker decision.*

1. Is the request something we can help with?

We'll look to see what the unexpected need is, and where we can be of most help. If it's not something we can assist with, we will tell the member as soon as possible but also look at other ways of helping, for example signposting towards suitable advice.

2. What is the financial position of the individual or household?

We will look at all household income and essential outgoings, and what is considered to be reasonable expenditure on living costs.

Note: a shortfall between income and expenditure does not automatically qualify someone for financial assistance. We may signpost the member towards getting advice on budgeting and reducing non-essential expenditure, especially where this might enable the applicant to deal with their financial difficulties.

3. Their personal circumstances – health, domestic, work etc.

Here, we consider whether other factors should be taken into consideration – for example, has there been a recent relationship breakdown or change in employment terms and conditions that have contributed to the financial difficulties?

4. What has the applicant done, or tried to do, to improve matters?

For example, where debt or arrears on debt payments is an issue, has the applicant taken advice or tried to reach an arrangement to clear any arrears before requesting financial assistance? Or, where finances are under pressure, have they already looked at ways of minimising their non-essential expenditure?

5. What are the consequences for those involved?

Here, we consider what might be the impact if we are unable to advise or assist.

6. Is this a short or long-term problem?

This might influence the package of help that may be agreed. NUJ extra should be seen as a short-term safety net as we cannot provide long-term or ongoing financial support.

Where financial difficulties have been longstanding and unconnected with a recent, unforeseen event, it is more likely that the applicant will initially be referred for expert advice such as budgeting and/or debt advice.

What will delay the assessment of an application?

If paperwork is missing, no assessment will be undertaken until it is received. It may not be apparent that supporting paperwork is missing until the assessment is carried out. If this happens, NUJ extra will contact the applicant to let them know what is needed. If this is not sent, a decision on an application may be delayed.

How is an application decided?

Once we have received a completed application form, we contact the nearest NUJ Branch or Chapel. If there is a local Welfare Officer, we will ask them to get in touch with the member to offer assistance. They will tell us about the member's circumstances.

The chair of NUJ extra may be able to make a decision quickly about how best to help. In addition to grants or paying bills, this may include offering debt counselling or other services. We provide temporary help to most applicants but we may offer long-term help to some dependants, making regular payments to top up their income.

The trustees produce a set of guidelines to help the chair make these decisions.

You can read these in full on the NUJ website at <https://www.nuj.org.uk/resource/guidelines-for-nuj-extra-2020-2021.html>



The chair's decisions are interim and must later be endorsed by the trustees. That means the chair may offer short-term help and the trustees could later add to that. If an application includes unusual aspects, the chair may not be able to make an interim decision and will refer the application to the next full meeting of the trustees.

Trustees meet four times a year, when they review recent applications and may offer further help. They also review the NUJ extra guidelines once a year, setting the income levels we aim to provide to our long-term beneficiaries.

How long does it take for an application to be assessed?

A complete application can usually be decided within four weeks. If the application is urgent, this time scale may be much shorter. If an application falls outside the criteria, the member and Welfare Officer will be notified as soon as possible.

Once an application is in the system, under what circumstances should I contact NUJ extra?

If the applicant tells you their circumstances have changed or worsened, let us know immediately. This will ensure our assessment is based on the most up-to-date information. Depending on what we are told, it also gives NUJ extra the opportunity to consider whether the case should be re-prioritised.


Decision & outcome

What financial help can a member expect to receive?

There is no automatic entitlement to financial assistance. All help is discretionary. Our assistance is needs-related and assessed on an individual basis. As a result, we are unable to give a clear indication of the likely amount of help until an application is submitted and the assessment process completed. There is no guarantee that help will be agreed in every case. Some applications are unsuccessful.

Where help is agreed, it is usually non-repayable. However, financial limits are set for different grant categories and this means that, in many instances, we can make only a contribution towards any specific need that the member has.

Will length of membership influence the outcome of an application?

Yes. We can help only full members, some former full members and dependants of deceased NUJ members. Full members must have paid at least one year's contributions. [Details may be found at <https://www.nuj.org.uk/about-us/nuj-charities/nuj-extra/who-we-help.html>](https://www.nuj.org.uk/about-us/nuj-charities/nuj-extra/who-we-help.html) 

Members are responsible for ensuring they pay their subscriptions at the correct rate and that their membership record is up to date. If there is any concern about this, the member should contact NUJ Membership at membership@nuj.org.uk to have their details updated.

One of my cases has been referred to the Board of Trustees – why is this?

It could be that the member has made multiple applications and/or has already received what the Board considers a significant amount.

Rules around membership

To access the range of benefits, individuals are responsible for ensuring they pay their membership subscriptions at the correct rate and that they are not in arrears. Members should contact NUJ Membership if there are any concerns about this.

Are documents returned to the applicant?

No. This is why photocopies or scans should be submitted.

How do I get to know the outcome of an application?

Whatever the outcome, you and the member will be notified by email, post or telephone.

What should I do if a member is dissatisfied with the outcome of their application?

There is no appeal process. However, you can request a review of an application if you feel there is additional information that has not been taken into account.

Other frequently asked questions

My member was struggling before they joined the NUJ. Will this be a factor when assessing their application?

The charity is unable to offer financial assistance with debts or costs associated with events prior to membership, although advice will be given, including details of any alternative charities that may be able to consider help with earlier issues.

How do the regulators define financial hardship?

Although you have to be in financial need (hardship) to be considered for help, this does not mean you have to be destitute. NUJ extra follows the guidelines of the Charity Commission (England & Wales) and the Office of the Scottish Regulator that you are in financial need if you do not have 'access to the normal things of life that most people take for granted' such as housing, heating, food and clothing.

Can applicants request help for something they've previously received a grant for?

Most grants are one-offs. Generally speaking, there would have to be exceptional circumstances for the same help to be repeated.

Can I contact NUJ extra to discuss a case before completing an application?

Yes, especially if you're unsure about anything. We can help with general queries, if you're uncertain about how to advise a member, or whether to signpost them to another organisation.

Is fraud ever an issue?

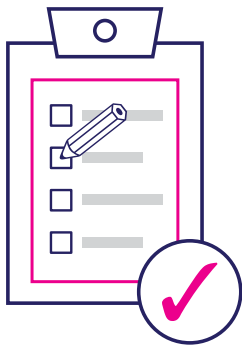
Applicants are required to sign a declaration that the information supplied on the form is true and complete. Anyone giving a false or partial picture of their circumstances in order to get assistance may be subject to the union's disciplinary procedures. A false picture would be, for example, failing to declare a partner with an income, or that there is income or savings to live on other than those declared on the application. It is also fraudulent to accept a payment from the charity if circumstances have changed to the extent that hardship is no longer an issue.

I called to check the progress of an application – why won't you discuss this with me?

If the applicant sent in the form without reference to you, then for reasons connected with Data Protection we cannot discuss the case with you unless the applicant gives their permission.

Can members apply for help without going through a Welfare Officer?

Yes. Some members prefer the anonymity of applying directly; maybe they're already being helped by another organisation, e.g. Citizens Advice, or perhaps it's difficult to make contact with their Welfare Officer due to their work location/shift pattern. But we always encourage contact with the Branch/Chapel as we know how invaluable local support can be.



Checklist

Pre-completion.

- ◆ Have you checked that the applicant is eligible to apply?
- ◆ Are there alternative sources of help that the member should be looking into before submitting their application?
- ◆ Familiarise yourself and feel confident with filling in the form before you start to help anyone else. Make sure you know the relevance of questions because the member may ask you about them.
- ◆ Have you checked the financial assistance criteria on the NUJ website?





Checklist

Make sure:

- The application form is completed, with all relevant information given as fully as possible.
- The handwriting is legible, if the member chooses to fill it in by hand.
- The form has been signed and dated. Applicants must sign their own forms. Unsigned forms will be returned.
- You have included your own assessment of the applicant's situation, if they have asked you to help, and any other information you think is relevant to their request.
- The applicant's circumstances and their reasons for seeking financial assistance are unforeseen.
- The help asked for is something we can consider (check latest criteria).
- Any exceptional circumstances are clearly explained.
- Complete the relevant paperwork and shred your copy of the application form or delete files on computer when you receive notification that the case has been decided.
- Check with the member that they have received the decision letter. If advice has been given, check they are clear about what they need to do and, where appropriate, offer support.

Section 10

Case Studies.

- 
-  61
 - 1. Getting back to work.
 - 2. Emergency help after relationship break-up.
 - 62
 - 3. Crisis during illness.
 - 4. Making ends meet on a pension.
 - 63
 - 5. Help for home improvements.
 - 6. Working in partnership with other charities.
 - 64
 - 7. Burglary nearly spells disaster.
 - 8. Support for daughter with rare condition.

[Contents](#) 

The following case studies are examples of some possible ways NUJ extra can be of help, and the type of enquiries you may receive. These fictional cases do not cover every problem or solution, but are intended as useful illustrations of our work.



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1. Getting back to work

Susan has been an NUJ member for more than 30 years and works as a sub-editor in the magazine sector. A few weeks ago, she was involved in a road accident. One of her legs was so badly damaged that it had to be removed. She has used most of her savings over the past few weeks paying the mortgage. She has two school-age children who were looked after by her parents while she was in hospital. Susan divorced her husband five years ago.

Susan's magazine has kept open her job, and she wants to return to work as soon as possible. She is having therapy to learn how to use her false leg, but a motorised wheelchair would be an enormous benefit in aiding her mobility. NUJ extra can provide a mobility scooter and a short-term grant to assist her in getting back to work.



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2. Emergency help after relationship break-up

Janice's partner left her a couple of days ago. She discovered her joint bank account had been emptied – just two days after she had been paid. Janice is in a terrible state. Her main concern is that she doesn't have a penny to pay for her travel to work and has little in the way of food for her and her two children. She has no other family and doesn't know what to do.

The local Branch Welfare Officer contacted NUJ extra to apply for an emergency grant. Janice needed to complete the online application form and provided an ATM mini-statement printout to confirm she had no money, as part of the straightforward and quick application process.

To help Janice through to her next payday, the trustees asked her to complete the standard online application form in case she needed further support. The Welfare Officer advised Janice to contact her bank immediately, to let them know what had happened. The best option is for Janice to open a new account before next payday, but she needs to discuss this with her bank.

For more information on emergency assistance, go to [Section 9 Financial Assistance](#).





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3. Crisis during illness

Moira is a reporter for a local newspaper, but has not been working following surgery for kidney cancer. She has a partner, who is a restaurant manager, and a young child. She has been off work for three months and things have been pretty tough for everyone. Moira is particularly worried because her partner has already lost earnings through taking care of their daughter, and she's scared his job might be under threat. She's also paying out a lot on prescriptions dealing with the follow-up to her surgery. Her doctors are pleased with her progress and are confident the tumour has been fully removed, but she is still too weak to return to work.

NUJ extra's first task was to check that Moira was claiming any benefits to which she was entitled. Help with childcare, prescription costs and a wellbeing break were all possible options that NUJ extra could help with.

As her partner works in the hospitality sector, a referral to Hospitality Action – an occupational, grant-giving charity similar to NUJ extra – is also a possibility.



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4. Making ends meet on a pension

Doris is the widow of a long-time member of the NUJ. She has been living on a small pension from her husband and her state pension, but is finding it hard to provide for the basics of food and heating. She has just learnt that her boiler has packed in and is beyond repair, and that a new one will cost almost £2,500.

The Branch Welfare Officer advised her to contact NUJ extra for an emergency grant. The trustees agreed to provide a grant to replace the boiler. They also recommended Doris should check with her energy provider to see if she can get a better deal, and that she should confirm she was getting her winter fuel payment from the government.

The trustees also considered whether Doris was eligible for a regular grant as her pensions did not reach the minimum level set by the trustees. In this instance, she was awarded a small monthly payment to help with regular bills.

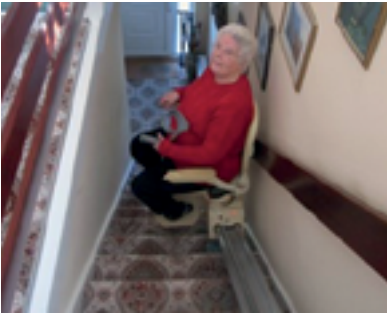


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5. Help for home improvements

John is a retired member. He lives alone on a very small pension. His health is not good and he is unable to work. His home is in a very poor condition and the broken plumbing in the bathroom means he is unable to bathe properly or heat his home. He sleeps on an armchair in the living room.

NUJ extra has paid for John and his cat to be put up in a bed and breakfast for two nights whilst cleaners come in and deep-clean his home. A plumber has been called in to fix the plumbing, new carpets are being fitted, and furniture including a new bed has been bought. Living in a clean and heated home means John's health is improving, and he can take better care of himself.



6. Working in partnership with other charities

NUJ extra often works with other charities to provide help for members. When Margarete needed a third hip operation, going up and down stairs became torture, and even getting up from a chair was very painful. Her husband, John, had to become her carer. With the help of NUJ extra, the armed forces charity the SSAFA, the RAF Benevolent Fund and the Journalists' Charity, a new stairlift was installed in their home, together with an electric, high-rise chair. The charities also paid for the replacement of a gas convection heater at the foot of the stairs in the hall, and the installation and repositioning of an electric power point for the stairlift.

These improvements relieved the pain in Margarete's hip and reduced the pain of going up the stairs one at a time.

"I felt the benefit of the stairlift right away," said Margarete. "At the end of the day, the pain in my hip was relieved as I went up and down the stairs. The new chair offers me good support and helps me stand up more easily." John added: "Before this, we had no idea that this sort of help was available."



7. Burglary nearly spells disaster

Criminal activity nearly put an end to freelance Emma's career. Disaster was averted only when NUJ extra stepped in to help, allowing her to get back on her feet and make a new start. Emma was burgled one summer and her laptop and passport were taken. Although finding her front door smashed was a major shock, the biggest loss was the theft of her computer, along with seven years of writing and images, together with the contact details of countless people.

Emma made contact with NUJ extra for help through her Branch.

She said: "My application was handled with sensitivity and kindness. One of the trade union movement's original functions is still operating efficiently - material help when hardship hits. The help I received from NUJ extra has contributed enormously to my recovery from the experience. I now have a new laptop and the solace of solidarity has healed the distress."



8. Support for daughter with rare condition

Nick's daughter, Rhia, was born with a number of challenges. After two stressful years, she was diagnosed with a very rare mitochondrial disease. There are only six others in the UK with the condition, and about 50 around the world. The average lifetime of children in her condition is two years.

As a freelance, Nick was able to spend time in hospital and at home with Rhia, but at a cost. He remembers the many clinic meetings, genetic testing, time in surgery and investigating new therapies.



"That's where NUJ extra was so very welcome," he said. "We didn't have to prove we were in desperate need or fill in 60-page forms to demonstrate that we were 'deserving', and that was such a relief. Helping to fund a specialist hydrotherapy bath brought significant relief to our non-verbal, non-mobile, deaf-blind child."

Some regular financial support, although small, took the edge off the money worries caused by Nick not being able to work as much. It allowed him to spend more time with Rhia and his family. The support of NUJ extra also opened up the Journalists' Charity, with support for a bathroom adaptation and, later, for a specialist wheelchair adapted vehicle that can take Rhia, her equipment and the rest of her family out and about.

Eight years on, Rhia is thriving. Nick reports: "She is a bossy, smiley, happy girl who excels at school, and we are looking at the next stages that we never thought possible."

Section 11

Publicity & Fundraising.

- 
-  66 Publicity & fundraising.
 - 67 Making reports about your work.
Fundraising.
Don't keep your new role a secret from colleagues!
 - 68 Regular donation.
 - 69 Checklists.

[Contents](#) 

This section is intended to help you start publicising your new role and NUJ extra services among your colleagues. There are checklists at the end to help you begin spreading the word and raising money for the charity.

Publicity & fundraising

In order for NUJ extra to function well, members must know about it. If they don't, then no-one will look to you for help. You are an ambassador for the charity. This is a major part of your role which will become increasingly important. NUJ extra is unique, and this is a great selling point for new members.

The importance of publicity

It is vital that we keep members informed of the services we provide, and the help available to them. You could also think about how you might engage with retired members.

TIP



Members will seek our help only if we publicise the service. Members who are most in need of our services may find themselves in a sudden and unexpected crisis.

It is important to constantly remind members about NUJ extra so they remember we are there for them when they need us.

Promoting the service

First and foremost, your role is to make members aware that they have access to our services.

If members don't know about the service, why would they even contact you?

Once colleagues in the Branch or Chapel know who you are, you need to start reaching out to members. This means clearly explaining the help available.

NUJ extra at Headland House can help with publicity materials, including posters and leaflets that you can use to advertise the service. Trustees are often able to give a talk to a Branch or Chapel. Publicity materials will get the key ideas across and give the necessary information to members in need of assistance.

You can help to create a positive image of NUJ extra by promoting the service wherever possible and developing the work of the charity within your Branch or Chapel.

Recruitment

Publicising NUJ extra is also a great way to attract new members. In a crowded field of trades unions, it is vital to emphasise this selling point.

Working with your employer

There is also potential for building relationships with employers by emphasising the benefits of our services to them and their workers. Once they understand how useful our services can be in assisting members and their dependants, they may be keen to support your work and encourage referrals to you. Employers are often the first to recognise the additional benefit to the well-being of their workforce of having an effective Welfare Officer in their organisation. This may also help to secure appropriate facility time.

We look further at the issue of facility time in Section 5.



Publicity techniques

Part of what makes a good Welfare Officer is being a good self-publicist. You should always try to be active when it comes to raising the profile of NUJ extra and the great work you do for us.

Social media


Using social media offers a more interactive relationship with members than putting information on a website. For example, your Branch or Chapel's Facebook and Twitter accounts – if it has them – are great ways to share information about NUJ extra. Use social media to share news and publicise events. If you can include a relevant photo with your post, this helps people engage with what you're saying. Facebook allows you more space to give detail (so don't forget you can always tweet a link to Facebook), while Twitter is a great way to tap into topical conversations. Have a look what's 'trending' on Twitter and join in with current conversations, for example #UniversalCredit.

Making reports about your work


All Welfare Officers play an important role in the effective functioning of the Branch or Chapel, and are members of its committee. You should always try to attend Branch or Chapel meetings so that welfare issues are properly considered when plans and strategies are being developed. As a Welfare Officer, you are accountable to the committee and should make regular reports about your work. You should keep your committee, reps and members up to date with any developments relevant to NUJ extra.

In your reports, you should detail:

- *National developments and our achievements nationwide.*
- *The work you've undertaken, e.g. how many members have contacted you, how many have applied for financial assistance, and outcomes.*

(See form at Section 6 – Welfare activity) 

- *Upcoming events and fundraising initiatives.*
- *Remember: whilst case examples are useful for illustrating how you have helped, no personal information can be given. A general overview is always helpful for others to understand our work.*

See also Section 7. 

Fundraising

As a charity, our income is dependent on the support we receive from individual members, Chapels and Branches. Fundraising is an important activity for us.

While we do not expect Welfare Officers to be fundraisers on top of their other responsibilities, we do need your support in ensuring your Branch/Chapel and members are actively encouraged to consider different ways of donating.

To help get you started, at the end of this section we've included a checklist of simple activities that we ask all Welfare Officers to carry out.

Don't keep your new role a secret from colleagues!

Do:

- ◆ Brief your committee, reps and members about NUJ extra, and make yourself known to them.
- ◆ Keep reps informed so they can signpost members to you, and promote initiatives such as winter fuel grants and school uniform grants, as well as the support the charity can provide to members at particular times of stress. This is especially important as reps will be some of your most important channels for reaching members.
- ◆ Put materials on notice boards in and around the workplace, keeping members up to date with information on NUJ extra.
- ◆ Set up a stall at recruitment days.
- ◆ Use email and social media to send out notices and information.
- ◆ Write a regular article for your NUJ or staff newsletter, if you have one.
- ◆ Talks: Volunteer to talk to relevant workplace groups or colleagues on committees about your work.
- ◆ Arrange to give a presentation on NUJ extra to your employer or human resources department.
- ◆ Try to get your employer involved – for example:
 - *You might be able to get a message about NUJ extra on your employer's wage slips.*
 - *You might be able to become part of the staff induction process, e.g. give a short presentation at staff inductions or be mentioned in an induction pack.*
 - *You could also contact HR or Occupational Health and let them know about NUJ extra so they can refer employees to you.*

The best publicity, however, will be word of mouth recommendations from members you have helped. Once members have used your advice and assistance, you will find that word rapidly spreads about the value of our services. Little things like getting back to people promptly and remembering personal details are important in maintaining a positive image of NUJ extra.



Regular donation

Your Branch may want to make a regular donation to NUJ extra. Setting up a standing order or direct debit payment is very straightforward.

Just email extra@nuj.org.uk and we'll send you all the details you need.

Anyone can donate money to the charity. Members should log in to the website before making a donation to avoid filling in forms.

You can donate through the NUJ extra website

by visiting <https://cafdonate.cafonline.org/433#!/DonationDetails>



“Thank you very much for all your help. This will make a big difference to my financial situation, so I really appreciate all the help and support that NUJ extra is giving me.”

Members can also donate while they shop by using whichever online charity donation method they prefer.

We are registered with:



facebook

Members can also choose NUJ extra when Facebook suggests setting up a fundraiser.

Just to give one example:

Easyfundraising has 3,700 retailers, such as M&S, John Lewis and Argos, but also includes market places, such as eBay and the craft marketplace Etzy.

Gift Aid

Gift aid is an important source of income for NUJ extra as it provides tax relief by enabling us to claim 25p tax back for every £1 donated by an individual when they **gift aid** their donation. CAF Donate manage the gift aid on behalf of the charity.

For the avoidance of doubt, NUJ extra is not endorsing any of these retailers, shopping schemes or social media companies.

We are simply making ourselves available on as many fundraising platforms as possible.



Checklist


Publicity and fund-raising.

- Have you informed NUJ Membership about your appointment?
- Have you downloaded any materials you need, including application forms? (Make sure you keep all your information up to date by visiting the NUJ extra web pages, and familiarise yourself with the online application form which is almost the same as the downloadable version).
- Have you told members about your new role?
- Are you able to put an article in the Branch/Chapel newsletter and your employer's staff magazine or newsletter, if there is one?
- Have you made contact with your Branch/Chapel committee and reps, and let them know when and where they can contact you?
- Have you put up some publicity material?
- Have you tried to get your employer involved, e.g. at staff inductions or with the HR department?
- Are you making regular reports to your Branch/Chapel committee?
- Are you using NUJ extra as an incentive to recruit new members?
- Ask the Branch/Chapel to support us with a regular donation.
- Think about whether your Branch/Chapel could get involved in fundraising, for example raffles or quiz nights.



Here for you.

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Registered Charity No. 1112489

Contents 