



University of Bristol University & College Union
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UNIVERSITY OF BRISTOL UCU PROTOCOLS FOR DEALING WITH CASEWORK

Needing support or advice normally means something has either happened to you or something that should have happened has not. UCU provides advice, support and representation for UCU members to assist in remedying, where possible, such events.

The following protocols are those adopted by [Bristol UCU](#) concerning the provision of such advice and support.

- You must be an existing member of UCU to receive advice, support and representation. New members will not normally be offered full support and **representation for issues that arose before or within 90 days of joining. This applies in particular to members who have joined as a result of a ‘pre-existing’ difficulty or problem at work.** However, in the case of University of Bristol restructures, Branch Officers may decide that staff members can join UCU and receive representation from the start of their membership.
- For situations which have arisen within or before 90 days of joining, we offer a one-off, hour-long meeting to advise member(s) on rights and possible courses of action but we cannot offer ongoing representation.
- We may not represent members who have previously lapsed from membership and do not rejoin until they need assistance.
- The branch Casework Coordinator or particular caseworker allocated may sometimes need to inform member(s) of the distinction between wider cultural issues of institutional injustice -- best addressed through campaigning -- and individual or collective cases handled through advice and representation in university procedures and policies.
- It is very important that members maintain an appropriate level of confidentiality about cases, and do not discuss them widely. A UCU caseworker will only discuss aspects of the case with another UCU caseworker after being given permission by the represented member, and as necessary to meet the needs of the case. Caseworkers are also asked not to discuss cases with other UCU members unless necessary. Casework information is shared amongst Bristol UCU Branch Officers as part of casework review, but information is not shared outside that group.
- Should the caseworker require additional support from either the UCU Regional Office or Head Office, the member will be informed. Such support is authorized through the branch. It will be arranged by the Bristol UCU Casework Coordinator in consultation with Branch Officers and the particular caseworker(s) involved. Individual members or caseworkers should not approach Regional or Head Office

- Should members have a problem with the advice or support received, they should contact the Casework Coordinator who may seek further advice from Branch Officer colleagues or from the UCU Regional Office.

Members are not obliged to accept advice offered, nor are they entitled to request a different caseworker. If the member requests a change of caseworker, the Casework Coordinator will consider the request. If member(s) take actions which UCU believes to be detrimental or harmful to members and/or UCU, we may refuse to continue to represent them.

ROLES & RESPONSIBILITIES

- UCU caseworkers provide a member(s) with advice, support, and, where agreed, representation.
- Members will be kept fully informed of the process and progress of the issue: no action will be taken on their behalf without agreement.
- Members will be given contact information for their UCU caseworker. It is important that you understand that caseworkers also have a 'day' job and therefore if you do not hear back immediately please be patient: the caseworker will return your call/email as soon as they are able to.
- Unless agreed with the caseworker, you should not expect to receive communications outside of the normal working day.
- Members should work closely with the nominated caseworker, providing them with all relevant information when requested so that they are fully apprised of the issues.
- Caseworkers fulfil the role of advising and, where agreed, representing members. The casework relationship is thus collaborative. Members are expected to take the lead in giving a clear statement of the overview and current status of a situation in terms of university procedures in so far as these have been indicated by HR or line management, providing overviews of documents to support arguments, etc.
- Similarly, if members decide to use another organisation, or instruct a lawyer, UCU will not be able to support or represent them fully.
- For contact details of Casework Coordinator, Branch Officers and Executive members, please visit the Branch website:
<https://www.ucubristol.org.uk/contact-us/branch-officers-and-executive/>