

# PARTNERSHIP WORKING AT REGIONAL LEVEL



# A BEST PRACTICE GUIDE



## Introduction

Regions play a key role in UNISON's development and governance. Their function is set out in detail in Rule F of UNISON's Rulebook (see Appendix A). This includes overseeing the deployment of regional resources, organisation and the development and implementation of policy.

In 1998, the union's Strategic Review highlighted the importance of regions and their relationship with the national union. The subsequent report on devolution took account of the impact of UK devolution and enhancing regional policy making powers.

It is crucial to the success of the union that regions function effectively. While the regional secretary, on behalf of the general secretary, has responsibility for the day to day management of the region, regional lay leadership has a legitimate role in monitoring deployment of resources to region. In particular, there must be a strong relationship between regional secretaries, members of the regional management team (RMT) and the regional convenor's team.

## National liaison

Regions have a central role in developing UNISON's lay democracy and organisation. The regional leadership must ensure that regions are collectively and independently consulted on priority and strategic issues. To aid this process, there are five national meetings of regional convenors, including an annual two-day seminar; plus two national joint meetings with regional secretaries.

## How partnership works

A close working relationship means ensuring that information is shared within the region between the regional secretary, the RMT, the regional convenor and the regional lay leadership, on issues such as:

- branch organisation
- policy development
- campaigning
- priorities
- deployment of resources
- communications
- industrial action.

## Facilities for senior regional lay leadership

Adequate facilities must be provided for the senior lay leadership to carry out their duties. Already, the importance of this has been recognised at national level, through the provision of electronic organisers, UNISON email addresses and regular meeting and training sessions.

A minimum provision of facilities should normally include:

- use of facilities within the regional office
- access to regional office, including use of meeting rooms, by arrangement, subject to availability
- secretarial and administrative support
- allocation of a PC, printer and modem with access to email
- supply of printed stationery in the convenor's name, to include headed note paper, compliment slips and business cards
- supply of a mobile phone/pager where required
- feedback from meetings of the regional management team and systems developed to facilitate communication between the lay and full time structures of the union
- consideration should be given to a regional group of senior lay activists/officers and management team, or similar liaison group, to meet on a frequent basis to discuss regional strategic issues and the resolutions of council and committee.

Additional costs arising from the above will be charged to the lay activity budget, other than premises and staff support.

## Regional constitutions

Broadly in line with national rules, regional constitutions have been developed to reflect regional activities and working practices. They aim to help develop union organisation and improve participation.

Copies of all regional constitutions are held at national office and are available on request.

## Supporting branch organisation

In addition to the working with regional council and service groups, there is a requirement that regions have a lead role in promoting and monitoring branch development.

This includes responsibility for managing the process of restructuring branches, as delegated by the National Executive Council in accordance with Rule F 3.3.

In doing so regions will be required to:

- work within UNISON's national policies, objectives and procedures
- apply the core principles laid down in the NEC's Scheme of Core Principles concerning the establishment and restructuring of UNISON branches
- liaise with the national office as appropriate
- comment on allocation of members to service groups, as NEC exercises its powers under Rule D.3.2.

As part of this process, regions identify a joint body made up of lay officers and paid staff, based on partnership principles, to manage the process on a day to day basis (known as the regional group). This group has the power to initiate and assess proposals for branch restructuring.

Regions are also responsible for managing the regional pool. Requests for additional funding should be linked with branch development plans and agreed at regional level using the lay structures of the region. Decisions taken at regional level should follow a national protocol agreed by the NEC.

## Role at national delegate conference

Regions have an important role to play in the union's democracy. At national delegate conference there is close liaison with regions from the standing orders committee and the NEC. Regional delegates have an important role to play in co-ordinating input from delegates in their respective regions and liaising between regions.

Before conference, the region also has responsibility for implementing the scheme of representation and determining branch appeals.

## Working to the union's national objectives

Regions need to set work plans that work within these parameters. There is a need for regular reviews to ensure these are being met. There must be some flexibility within the system to take account of issues which arise which are unplanned but have to be serviced – such as industrial disputes. However, variations should be limited, to prevent priorities becoming a 'wish list' and the system falling into disrepute.

Mechanisms need to be developed to ensure service groups and self organised groups are an integral part of this process rather than being seen as groups who need to be consulted. Likewise, staff within the region need to ensure their objectives and responsibilities reflect the regional priorities.

## Regional/branch interface

Good communication with branches is essential. There should be service level agreements and standards which both regions and branches should sign up to.

This should cover good working relationship practices and communications between regions and branches and vice versa. These agreements should include written, telephonic and electronic communication between members, their branches and the region.

## Democracy in UNISON

Regional representatives, like all representatives in the union, have a responsibility to those they represent. Therefore, they should ensure that they represent the views and policy of the region when using their regional title. They also have a responsibility to report back to their region and to ensure that they uphold UNISON rules and procedures.

More information can be found in the 'Democracy in UNISON' guidelines.

## Politics and campaigning

Regions are responsible for the co-ordination and development of political structures across the union in line with national delegate conference policy. This includes promotion of Labour Link activity and encouraging branch and regional access to GPF funds (where regions have delegated expenditure to a limit of £5,000 in line with GPF guidelines).

In relation to press and broadcasting activities, regions should ensure compliance with the UNISON media guidelines, which are contained within the 'Democracy in UNISON' guidelines.

## Self organisation

Regions should promote self organisation in line with UNISON national guidelines, in particular ensuring the close liaison of self organised groups and mainstreaming of equalities work into union structures.

## Finance

Lay activity budgets (as per 2005 lay activity budget settlement) are overseen by regional committee with budgets allocated to regional standing committees, SOGs, young members, retired members and service groups etc. following consultation; regional operating budgets (in accordance with the regional funding formula) are managed by regional secretaries but subject to consultation as per Rule F 3.1.1.

The West Midlands region has developed a regional finance handbook, which sets out best practice for financial procedures.

## Standards of service delivery from regions to branches

Regions have a role in:

- monitoring the allocation of resources
- resolving branch complaints
- assisting with organisational problems
- ensuring probity at branch level.

## Key tasks of regional convenor

The regional convenor is elected by regional council delegates and is the senior lay member at regional level [Rule F 4.4.6]. The regional convenor usually chairs regional council and regional committee meetings.

Tasks relating to the office of regional convenor include:

- ensuring development and maintenance of strong and flexible branch structures including supervising allocation of regional pool
- monitoring deployment of resources allocated to the region to ensure that UNISON objectives are being effectively pursued
- implementation of national policies and campaign strategies, in particular, recruitment
- liaison with region's NEC representatives
- supporting union communications and lay member education provision at regional level
- liaison with self organised groups, retired members and young members
- consulting with, and representing the union on, external bodies in relation to economic, political and social issues in accordance with Democracy in UNISON guidelines and devolution protocol
- participating in the regional convenors' group at national level
- in partnership with the regional secretary, ensuring effective lay governance via regional council and other lay member democratic structures within the region.

## Other regional lay posts

Many regions have established collective lay leadership teams with established roles for deputy convenors and, in some cases regional treasurer. The specific roles and responsibilities of these posts should be set out in regional council constitutions.

## Key tasks of regional secretary

The regional secretary is appointed by the NEC and reports to the assistant general secretary on functional and operational issues and to the deputy general secretary on policy and strategic issues.

Tasks relating to the post of regional secretary include:

- effective management of all staff employed in the region
- ensuring that the region fulfils rule book duties and obligations
- delivery of the union's equality policies, in particular fair representation and proportionality
- efficient financial management and deployment of resources within the region
- promotion and delivery of UNISON objectives and priorities
- participation in senior management group
- management of relationships with external bodies
- media spokesperson for the union at regional level, in liaison with the regional convenor, in accordance with UNISON media guidelines
- in partnership with regional convenor, ensuring effective lay governance via regional council and other lay member democratic structures within the region.

### **Other useful publications**

The following publications can be downloaded from UNISON website:

Democracy in UNISON guidelines: [www.unison.org.uk/acrobat/13305.pdf](http://www.unison.org.uk/acrobat/13305.pdf)

Code of good branch practice: [www.unison.org.uk/acrobat/16107.pdf](http://www.unison.org.uk/acrobat/16107.pdf)

The following are available on request from the executive office:

The devolution protocol for bargaining, communications and policy development.

NEC handbook.

# Appendices

## Appendix A

### Rule F.3: functions of regions

3.1 Each region shall have the following functions, namely to:

- .1 monitor the deployment of resources allocated to the Region to ensure that the objectives of the Union are being pursued in the most effective manner
  - .2 assist and advise the Regional service groups on issues relating to or of concern to the wider membership
  - .3 encourage the development and maintenance of a strong and flexible branch structure, in accordance with principles laid down by the National Executive Council
  - .4 assist in implementing national policy and developing campaign strategies, particularly relating to recruitment and retention within the Region
  - .5 consult with devolved administrations on public services and relevant economic, political and social issues
  - .6 ensure that appropriate education and publicity activities take place within the Region
  - .7 advise the National Executive Council on matters of policy, outside the responsibility of the Service Groups, and assist in its development
  - .8 assist in the administration and organisation of the Union's welfare and retired members' activities
  - .9 discuss branch motions as appropriate for the National Delegate Conference agenda on issues outside the responsibility of Service Groups
  - .10 assist branches in promoting proportionality and fair representation among conference delegates
  - .11 ensure representation of the union on outside bodies including TUC Regional Councils.
- 3.2 Each Region may deal with any matters or issues referred to it by a Regional Service Group in accordance with Rule D.3.8.1
- 3.3 Each Region shall have such authority in addition as the National Executive Council may from time to time determine.
- 3.4 The activities of the Region shall be consistent with the rules and general policy of the Union.

## Appendix B:

### **UNISON's vision**

UNISON believes in improving working lives and promoting social justice in the UK and abroad. We are campaigning for an end to discrimination and poverty. We have a vision of a more just and inclusive society where:

- public services are well-funded, responsive and accessible for all
- they are provided efficiently, but not for profit
- the people who provide them are properly rewarded, valued and heard
- the people who use them are listened to and learned from.

### **UNISON's values**

UNISON has a set of strongly held values, which are at the heart of our union:

- democracy – our members have a right to make the decisions that shape their union
- participation – we aim to share our skills, commitment and creativity to build a stronger union
- equality – we are all different, but we all deserve to be treated with respect and fairness. All of our voices should be heard
- solidarity – we work to support each other at work and in society.



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