

Private Finance Initiative – Pay for it indefinitely?

One Day Campaign Skills Workshop

Campaigning Against PFI in the NHS

COURSEBOOK

UNISON
Learning and Organising Services

06/08/02

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INTRODUCTION TO PFI

Introduction

The Private Finance Initiative (PFI) is one of a range of initiatives introduced by the last Conservative Government, aimed at increasing private sector involvement in the provision of public services. The Labour Government has sought to 'reinvigorate' PFI by streamlining the process and concentrating on 'viable' projects.

Under PFI, private companies design, build and finance the asset, such as a new hospital, school or housing, and depending on which service you work in, some staff may transfer from the public sector to the private sector company to deliver the service. The public body has to pay an annual fee to the private company under a long-term operating contract for the services.

UNISON believes that PFI is a more costly way of providing public services than direct borrowing by the public sector. UNISON is also concerned that transfer of staff to facilities-management companies will lead to a deterioration in terms and conditions and that the public sector will lose control over assets and service provision. The real danger is that under PFI the future provision of public services will be determined by what the private consortium wants rather than what the public need.

UNISON has developed a twin track approach to tackling the threat of PFI:

- Campaigning against PFI nationally and locally
- Getting the best deal for members where PFI projects go ahead.

UNISON continues to campaign against the high financial, employment and democratic costs of PFI and this one day course for UNISON members and activists is part of that campaign. The course is an introduction to campaign skills needed to fight the Private Finance Initiative and will help branches organise local campaigns against PFI. It also introduces UNISON's policy and strategy on PFI. The course is suitable for all members whether or not their employer has a current proposal for a Private Finance Initiative scheme.

This course, which has been produced by UNISON Learning and Organising Services to raise awareness of PFI and to encourage local campaigning around it.

Course Aims

The key aims of this course are to:

- Raise awareness among UNISON members of what the Private Finance Initiative is; its potential effects on our members and public services; and UNISON's strategy
- Encourage local campaigning on PFI

After completing the course participants will:

- Understand what PFI is and how to use arguments against it
- Be familiar with UNISON's twin-track strategy on PFI
- Know where to get information and advice on PFI
- Have developed a campaign or action plan on PFI to use in their branch.

Who the course is aimed at

The course is suitable for members both in areas where there are currently no concrete PFI proposals and for those where they already have knowledge of a potential PFI project.

The course is suitable for a group of a maximum 16 participants.

How The Course Will Work

Trade union education aims to help you develop confidence and practical skills, and to put the knowledge you gain during the course to good effect in your branch and workplace. To achieve this the course is organised in an active way that will give us all an opportunity to have a say, as well as listen to others. Therefore, you will often be working in small groups. To encourage a branch team approach to campaigning on PFI you will work as part of a branch team during the course.

Participants on the course may be from the same branch or from different branches. The course offers the opportunity to share experience of PFI and to come to a collective approach to campaigning against PFI and protecting members' interests where a PFI scheme exists.

Suggested Programme For a One Day Course

		Timing
Arrival – Tea and Coffee		30 minutes
Activity 1	Welcome and Introductions	30 minutes
Activity 2	Getting Information on PFI And Potential PFI Projects	45 minutes
Activity 3	Identifying the Arguments	35 minutes
Campaign Skills Workshops		60 minutes
Activity 4	Tieing it together - Developing a Local Campaign Strategy on PFI	105 minutes
Activity 5	PFI Checklist for Action	30 minutes
Course Review		15 minutes
Close of Course		

Working Together on UNISON Courses

Introduction

UNISON is committed to the fullest possible participation of all its members in the activities of the trade union. On trade union education courses, so long as the applicant meets the advertised eligibility criteria for the course, no-one should be put off from participating because of the actions, attitudes or language of other course members. In particular, women, black, lesbian, gay men and disabled members have the right not to be made to feel ill at ease or distressed on a course as a result of other course members' behaviour.

The following guidelines have been drawn up to help course members meet UNISON's commitment to the full participation of all its members in a practical and constructive way. You will see that underlying this guide is a commitment to the principle that everyone has equal rights to benefit from, to contribute to and enjoy the course. This means, among other things, that we should avoid language and behaviour that is unacceptable to other members, because it is sexist, racist, homophobic or offensive to disabled people.

We assume that course members will agree with these principles and hope the guidelines will assist in putting them into practice.

Working Together

A key feature of trade union education is the value it places upon the knowledge, experience and skills that each member brings with them to the course - both in terms of their trade union work and their everyday lives. It is important that everyone feels equal and able to make a contribution if they so wish. So:

- *Listen to what others have to say, and avoid being dismissive of their contribution.*
- *Wait until a speaker has finished and do not interrupt their train of thought.*
- *Aim to have reasoned discussion, not arguments.*
- *Any criticism should be constructive and help members to develop confidence, skills and knowledge.*
- *Make your own contribution as clear and concise as possible and do not dominate the discussion.*
- *Ensure that everyone who wishes to speak is given encouragement and the opportunity to do so.*

- *It is equally important that members on the course can speak openly about problems they or their members have experienced in the full knowledge that personal or sensitive information is restricted to the classroom.*
Confidentiality must be respected.

Language

Language is important and UNISON's policy is not to use language which offends or hurts people. This type of language should always be avoided as it causes distress. Often it is a reflection of stereotyped thinking about UNISON's membership and policies. Do not be surprised if you are challenged if you make broad sweeping generalisations about any group of UNISON members, e.g. that women only go out to work for pin money.

Language which contains anti-lesbian, anti-gay or disablist sentiments and which is abusive or threatening in any way should not be used and nor should jokes or comments which perpetuate discrimination.

Jargon

Jargon is a barrier to good communication. The more we become involved in trade union work the more likely we are to use jargon. Take care to explain any jargon or initials you use which other members may not be familiar with so that everyone understands what you are talking about.

Harassment

There must be no sexual, racist, anti-lesbian/gay or disablist harassment of any kind:

Sexual harassment - is defined as any unwanted and unwelcome sexual comments, looks, actions, suggestions, or physical contact that is found to be objectionable and results in an unpleasant or intimidating environment being created.

Racial harassment - is defined as any unwanted and unwelcome terms, comments, looks, actions or behaviour relating to a person's race, ethnic origin or colour which members of a racial, cultural or religious group find offensive and results in an unpleasant or intimidating environment being created.

Anti-lesbian/gay harassment - is defined as any unwanted and unwelcome terms, comments, actions, or behaviour relating to a person's sexual preference or lifestyle which is found to be objectionable and results in an unpleasant or intimidating environment being created.

Anti-disability harassment - is defined as any unwanted and unwelcome terms, comments, actions, looks or behaviour relating to a person's condition or speculation about a person's condition.

Outside Course Hours - Tea/Coffee/Lunch Breaks

What has been outlined as guidance for behaviour during course hours is equally applicable to the scheduled breaks during the course.

Outside Course Hours (Residential Courses)

The social side of courses - discussions in the bar for example - should be both enjoyable and valuable. It is important that this is true for everyone. This means on the one hand, making sure that everyone feels able to join in if they want to - just as in the class - on the other hand, not putting pressure on individuals to fall in with a group if they do not want to, e.g. drinking alcohol, going out or staying up late. If you stay up late yourself, be careful not to disturb others - everyone needs to be able to participate fully at the first session in the morning.

Time Keeping

The course has a tight timetable and members are responsible for their own time keeping. When participating in the course, you will often have a limited amount of time. Make sure you use it well and return to the main group in time for the report back.

Mobile Telephones

Using mobile telephones during the course or leaving them switched 'on' for incoming calls during the course is not acceptable. PLEASE SWITCH THEM OFF.

Smoking

Smoking is not permitted during course sessions. Smoking is an access issue for some members and smokers must remember this. Smokers who have difficulty in abstaining until scheduled breaks will be permitted to take smoking breaks during group/syndicate work, but not plenary sessions. (This will be subject to the rules of the establishment in which the course is being held.)

Conclusion

These guidelines are intended for you to use during the course to counter problems as they arise, and to ensure that no-one feels excluded from the course as a result of language, actions or attitudes of other course members. They also seek to promote UNISON's policies on discrimination and equal opportunities in a positive way as far as the conduct of trade union education courses is concerned.

ACTIVITY 1

INTRODUCTIONS

Aims:

- To get to know who is on the course
- To identify existing involvement in and experience of PFI
- To identify what you want to get out of the course
- To identify what PFI is
- ◆ To begin to look at the potential threats to the services provided by members in PFI schemes

Tasks:

Task 1

For this activity you will be working in pairs. Interview your partner to find out the information below. Take notes of what your partner tells you, as you will be asked to introduce them to the rest of the group.

Ask each other the following questions:

- Name
- Branch and positions held in UNISON
- What experience, if any, you have of PFI in your workplace
- Please complete the following sentence.

By the end of this course I would like to know/be able to.....

Task 2

Then; on a flip chart

- Write up a one sentence definition of what you think PFI is
- Make a list of three potential threats that PFI poses to your members jobs and terms and conditions
- Make a list of three potential threats that PFI could pose to the services that your members provide

ACTIVITY 2 GETTING INFORMATION ON PFI AND POTENTIAL PFI PROJECTS

Aims:

- To decide what information you need to collect about potential or actual local PFI projects
- To find out where you can obtain the information
- To develop strategies for obtaining information

Tasks:

PFI is a major threat to UNISON members working in the public sector and a danger to the public services that they provide. Campaigning to raise awareness of the dangers of PFI at the early stages can be crucial. Intelligence gathering is, therefore, extremely important at local level to find out whether any PFI schemes are being considered and, if one is being considered, what service is involved. This activity will help you to identify possible sources of information on PFI and potential PFI projects.

Task 1

Working in small groups, on the left-hand side of a flip chart, make a list of the kind of information you would need to collect about:

- a) a planned potential or actual PFI project in your area or place of work
- b) General information on PFI that would help with campaigning
- c) Other Organisations that you may involve in a campaign against a local PFI project

You will need to think about:

- How you could find out whether your employer is considering a PFI project
- Other PFI schemes which you could use as examples
- Government information about PFI (e.g. policy papers, guidance for employers)
- Alternatives to PFI
- Likely allies in any anti PFI campaign

Task 2

Try to identify where you could obtain that information and write up your possible sources on the right hand side of the flip chart.

Think about what you will do if your employer refuses to give you information, saying it is commercially sensitive. There is information on disclosure of information on the following pages.

Please use any of the materials available to you as these contain useful information on this. There is space on the next page for you to make your own notes on this.

Getting Information on PFI – Notes

Use this space to make notes of what information you might need and where you could find it.

Information Needed	Where To Find It

Name of Organisation	Contact Details Name Address Phone	Their position on PFI / Could they help in our campaign ?

FIRST STEPS CHECKLIST

Branches can negotiate PFI agreements with the employer. This does not mean that branches are signing up to PFI. The agreement can be simply a mechanism for ensuring that UNISON is provided access to information and any discussions on PFI proposals that will help in campaigning and protecting members' interests.

PFI agreements should provide for:-

- Consultation and negotiation with trade unions at the earliest possible stage. That is as soon as the local authority suggests any proposal for a PFI project.
- Full disclosure of all relevant information, including copies of key documents such as:
 - outline business plans/cases
 - full business plans/cases
 - copies of invitations to tender
 - invitations to negotiate
- Time off and facilities for stewards and branch officers involved in PFI projects, including facilities for training.

PFI agreements should ensure that your employer goes well beyond the minimum requirements on disclosure of information contained in the NHS Executive Guidance

It should include a commitment to

- Disclosure of Health Improvement Plan before publication
- Disclosure of any strategic outline case at the time it is drawn up and/or at the same time it is submitted to the Regional Office of the NHS Executive
- Disclosure of assessment of whether staff should be included in a PFI scheme setting out the reasons why staff should be included and allowing the union sufficient time and information to develop any objections.
- Disclosure of outline business case and final business case prior to publication.

Finding Information on PFI in the NHS

Openness

One of UNISONs main concerns about PFI has been the secrecy about PFI. Following long campaigning by UNISON the Government issued new guidance on disclosure of information in PFI schemes in the NHS in 1999 this says that: "The guidance sets out minimum requirements for disclosure of information. This says in paragraph 12.2;

"Openness and Public involvement are key features of the new NHS. PFI Schemes usually changes to the provision of NHS services. Local people, staff and their representatives must be able to comment on and respond to proposals."p48.

(NHSE Executive guidance on PFI in NHS Volume Two Selection and Preparation of Schemes chapter 12 – December 1999.)

The trust may argue that some information can be held back on grounds of commercial confidentiality but the guidance says "The approach to information should be based on the assumption that information should be released."p48. The guidance indicated that in general it is only some information that is included in the response to the final invitation to tender e.g. contract prices should not be disclosed. UNISON should challenge non-disclosure and press for maximum openness at all stages in the process. For example, key documents such as the strategic outline case and the outline business case have to be disclosed within a month of approval. UNISON should press for early disclosure of all documents and not accept minimum requirements.

Where to find information

UNISON Branches need to have early warnings on PFI. There are a number of publicly available documents you can request that will contain information about any proposed PFI scheme. In addition, the government has published a list of planned projects (Appendix Two) and UNISON monitors the list of projects put out to tender in the Official Journal of the European Communities (the OJE Advertisement). The main documents where you can find information are:

- ❑ **The Health Improvement Plan/Programme.** This is an overall plan for improving health in every Health Authority area. Every Health Authority should have consulted widely on its HIMP and copies must be made available on request. The HIMP may include a section on changes to NHS services. This may not specify whether PFI is going to be used if there are major service developments PFI will almost always be considered. If you cannot get hold of the HIMP document contact your UNISON Regional Officer.
- ❑ There may be a specific **capital development plan** drawn up by the Health Authority. You should request this. It will probably be drawn up

around the same time as the HIMP. You should request disclosure of this from the Health Authority. It will list in detail proposed building facilities developments over 2-5 years. Your local Primary Care Group may have a plan covering primary care developments.

The Strategic Outline Case

Any Trust that is planning a major capital development will have to draw up a Strategic Outline SOC for approval by the NHSE. The SOC sets out why the development is needed, examines options and puts forward a case for investment. In almost all cases if a SOC is approved PFI will be considered. Details of the SOC should be disclosed on request. Commissioning an evaluation of SOC can be a useful exercise in challenging arguments for PFI and developing alternatives. UNISON can help with this. Do not wait until the SOC is formally published. Request disclosure as soon as you try to obtain a copy (see below). The SOC has to be submitted to the NHS Regional Office for approval and must be disclosed one month after submission. Technically the SOC does not decide whether the scheme should be financed via PFI but only whether it should go forward for assessment but because of restrictions on public funding most schemes will be earmarked for PFI.

Outline Business Case

If the SOC is approved the Trust will be asked to draw up an Outline Business Case. This will examine in detail whether the project should be financed and provided by PFI. It does this by comparing the PFI option with a theoretical Public Sector Comparator. UNISON believes this comparison is biased and it should be challenged. (See UNISON document "Challenging PFI" chapter four for more information on how to do this.) The OBC should be disclosed to the staff side as soon as it is drawn up. It must be disclosed one month after submission. It is very rare for an OBC to conclude that a development should not go ahead as a PFI project although in some cases campaigning has secured public funding.

Information on inclusion of staff

One of the most important issues we need to find out about is whether the Trust intends to include staff in the PFI Scheme. The earlier we can find out about the Trust intentions, the more we can influence the outcome. In the Outline Business Case there should be a description of which services are included and whether risks will be transferred. This should include details of whether services may be included and this should be disclosed. The Trust will then carry out an evaluation of whether services will be included. This assessment should be disclosed to the trade unions so that these can be effective consultation over the issue and a chance for unions to make alternative proposals. (Only estates/craft services have to be included under government rules.) The final set of proposals from the Trust will then be

included in an advert in the Official Journal of the European Community (the OJEC Advertisement) and the Trust will issue an invitation to negotiate. In both of these documents should be disclosed to the trade unions.

The Final Business Case.

The Final Business sets out the scope of the proposal. This is drawn up prior to an advert for tenders being published. Again it should be disclosed at an early stage and must be made available within a month. Other documents that must be made available include the Invitation to Tender (which sets out more detail) and the OJEC Advertisement.

The best early information on PFI will however come from your informal network of contacts. Make links with relevant people e.g. sympathetic non-executive directors of Trust Board or staff representatives on PCT Boards where this is relevant. UNISON members may be able to help if they work in relevant areas although clearly no one should be put in a difficult position by being asked to disclose confidential information. You need an early warning system: the easier you know the better we will be able to influence things

Challenging inclusion of Staff in NHS PFI Schemes

Following campaigning by UNISON the government has changed PFI rules on how staff are affected. Since June 1999 PFI schemes do not need to include ancillary support services and transfer ancillary staff in PFI Schemes. Each Trust should make an assessment of whether such services need to be included basis on “value for money” criteria. UNISON is continuing to press for staff to be automatically excluded. Currently craft estates and maintenance staff known as “hard facilities management” still have to be included.

UNISON Branches should therefore:

- ❑ Seek to secure an agreement that there will be negotiations over whether services are included. This may include developing joint criteria. Contact UNISON Health Group for more advice on this and to obtain technical advice on the issue. See also chapter four of the UNISON “Guide to Challenging PFI”. (Stock Number 1763).
- ❑ Seek to obtain copies of any assessments by the Trust. This should be disclosed to the staff side (see example) and should give you information to make arguments against transfer. Do not wait until a decision has been taken, try to intervene before decisions are taken.
- ❑ Part of the process will include benchmarking (usually against other local Trusts) on the costs for support services. UNISON should try to ensure that this benchmarking is carried out in a fair way. You should request full disclosure of the results of the benchmarking.

- For some types of staff you may be able to use additional arguments. (See below).
- Under the NHS Plan the Government has said it wants to ensure cleaners are part of the ward team in order to improve cleaning standards. UNISON does not believe this can be achieved if services are contracted out in a PFI Scheme. In several areas UNISON has been able to ensure ward-cleaning services are not included in the PFI contract.
- UNISON has also made the argument that the Trust's ability to reshape its workforce to meet changing health needs is hampered if staff are transferred. Transfer of staff creates new demarcation lines. This is not in line with the aim of the National Plan.
- Any staff who have clinical support roles are currently excluded so the design of new job roles combining ancillary and nursing roles may be another way of excluding staff. We should argue that modernising staffing is made more difficult by PFI.
- Some scientific and technical staff are not currently allowed to be transferred if they directly support clinicians. Check with your Regional officer if services not on this list are included. The full list of service which may be transferred is attached. The Trust does not have to include any of these but cannot include other services at this stage.
- In many cases medical records staff have been kept in house because of concerns over quality and confidentiality if the service is transferred.

Local Authority Health Scrutiny Committees

Under the Health and Social Care Act 2001 (which covers England only) local authorities will have new powers to scrutinise service developments including PFI. They will set up scrutiny committees to which NHS Chief Executives will have to report and answer questions. This could therefore be a potential route to identify PFI proposals and question them. In addition the local authority will have the power to refer any concerns over service developments to a new body. Liaison with local government branches is therefore essential to develop the campaign against PFI. More guidance will be released on this issue of consultation PFI developments.

UNISON Branches should try to use these new opportunities for democratic scrutiny of PFI projects and build alliances in favour of alternatives.

Disclosure of Information on PFI Schemes in Scotland

There is specific information on disclosure of information on PFI schemes in Scotland and this is set out below.

Publication of full business cases

The Minister for Finance Mr. Jack McConnell announced on 24th June 1999 that full business cases (FBC's) for PFI projects signing from that date would be made publicly available. While this change applied directly to Government Departments and Agencies, the minister made clear his expectation that the rest of the public sector would follow suit. The following guidance on the publication of FBCs is similar to that already issued to Health Boards and Trusts and also applies to Local Government.

- FBCs may be edited to exclude details of a commercially sensitive nature.
- FBCs should be cleared with the Public finances Unit before publication
- FBCs should be made publicly available within one month of contract signature, financial close or FBC approval whichever is the later. This means placing it on view in the offices of the contracting authority, or the offices of the local authority, or at the local library when the contract capital value is in excess of £10 million.
- For schemes with a capital value in excess of £10 million, the availability of the FBC should be advertised in the local press.
- For schemes with a capital value in excess of £10 million, a copy of the FBC should be placed in The Scottish Parliamentary Information Centre.
- Once the scheme has reached its final closure stage, a copy of the FBC should be placed in the PFI library of the treasury taskforce at 1 Parliament Street, London SW1 3AG
- Each lodged FBC should contain a contact name, address and telephone number for queries about the particular scheme. Each document should also state that general questions should be addressed to Fiona McLennan, Private Finance Unit, 3-C23 Victoria Quay, Edinburgh, EH6 6QQ (Tel 0131 244 7500 Fax 0131 244 7499)
- Any request from a member of the public for copies of documents should be met, however contracting authorities may levy charges for copying and postage.

Cabinet Office Guidance on Staff Transfers – January 1999

ACTIVITY 3

IDENTIFYING THE ARGUMENTS

Aims

To explore:

- How to tackle arguments made in favour of PFI
- The most effective arguments to use against PFI

Preamble

In order to mobilise opposition against PFI you need to identify

What your objection to the scheme is

What arguments against PFI you can use.

What arguments in favour of PFI the employer might put forward and how you will counter them.

Campaigning against the Private Finance Initiative is not easy. The community and even staff may welcome the much needed capital investment without considering the long term implications for service delivery and cost. Local Councillors, Members of Parliament (MPs and MSPs), and Assembly members will often be ignorant of the true facts, or the long-term implications. Other unions whose members are not directly affected may not be supportive. And the local media will lose interest unless there is something new to report.

The case against PFI, however, is a strong one and in many areas has been made successfully. National campaigning has resulted in changes to the PFI process and at local level even where schemes eventually go ahead local campaigns have strengthened our ability to negotiate better protection for members.

Task 1

Working in your group and using the materials available to you identify the key arguments that might be used in favour of PFI and which UNISON would have to counter and the key arguments against PFI in relation to:

- Your employer
- UNISON members/other employees

- The general public, user groups and other outside bodies such as your local council/local councillors and political representatives such as MPs

Try to work out

- ◆ What arguments each of the groups listed may use to support the concept of PFI
- ◆ How you would counter arguments in favour of a PFI proposal. What are your alternative arguments?

You will need to think about issues such as:

- The cost of PFI
- What the potential effects on members and other employees are and who will be most affected
- What will happen to the facility or service in the short and long term
- Alternatives to PFI
- How you would counter arguments in favour of a PFI proposal. What are your alternative arguments?
- What information you will need to gather to develop and support your arguments against PFI

Task 2

Write the arguments you identify (both in favour and against) up on a flip chart and prepare a brief report (no more than five minutes) for the rest of the course on your discussions. If you identify arguments which might be used by others to support the PFI proposal, for example one the employer might use, you should say how you would counter that argument.

Task 3

When each group has reported back the tutor will ask you to identify what you think are the strongest arguments against PFI to use. This will help you to identify any potential weaknesses in your arguments that need to be addressed and those arguments that you should make most forcefully.

CHECKLIST ARGUMENTS AGAINST PFI

COSTS

- The real cost of PFI arising from the “buy now pay later” financing of PFI projects.
- The Authority does not have to find the money up front to meet the initial capital costs, in the short term any PFI deal may be more affordable than conventional procurement, but in the long term costs are higher than in conventionally financed equivalent projects – interest free credit does not apply here.
- The high setting up costs of a PFI contract.
- The lengthy negotiations with private sector consortia on the PFI bid involving solicitors and consultants.
- The bidding process for contractors is extremely lengthy and costly.
- The private sector borrows at much higher rates than the public sector, so the cost of funding the project is costly.
- PFI consortia usually want an excessive rate of return on their investment, e.g. the rate of return for Sky Bridge was over 20%.

LOSS OF FLEXIBILITY AND ACCOUNTABILITY

- PFI contracts can be anything up to sixty years. This commits the public sector to paying for services for long periods of time and limits the ability of public bodies to switch resources in the future. This means that where there is a need to cut spending the PFI contract payment will be protected and non PFI expenditure may have to carry proportionally deeper cuts.
- How will a public Authority know what type of hospital, School, Health Centre or other facility it will need in 30 to 60 years time? Will the facility still be of use or value to the local authority? Will it still be necessary or appropriate at the end of the contract?

IMPACT ON EMPLOYEES

- Cuts in terms and conditions for staff
Most of those affected by facilities management within PFI projects are likely to be women in manual jobs - cleaners, catering staff and other ancillary workers. Unless steps are taken to ensure that equal pay and equal opportunity policies are followed in contracts, the heavy hand of CCT will be

felt again in their terms and conditions. A contact compliance framework needs to be inherent in the PFI system to prevent such a disaster.

- Demoralisation, demotivation of staff.
- Reductions in quality of services.

NATIONAL AND POLITICAL ARGUMENTS AGAINST PFI

- UK's public finances are in a very healthy state. Last year the public sector net cash requirement (PSNCR) formerly known as the Public Sector Borrowing Requirement (PSBR) recorded a surplus of £7.4 billion. This means the Government can afford to significantly increase public borrowing directly to finance much needed investment in our public services without adversely affecting the PSNCR.
- Public spending by the Government is at its lowest for 40 years and the Government has cleared £32 billion of public debt. This is a key indication of continued under investment in public services.

CAMPAIGN SKILLS WORKSHOPS – ORGANISING THE DETAILED ELEMENTS OF YOUR CAMPAIGN

Introduction

During any campaigning against PFI you will need to map out three separate elements of the campaign plan

- Carrying out campaign research
- Publicity and campaigning
- Involving and organising members

Task

For this section of the workshop you will be asked to select a campaign element to work on and complete the following planning activity.

Before you do this however you will need to decide as a whole group

1. What your campaign aims are

- ◆ The concrete steps that you will need to take to achieve them
- ◆ Who will do what
- ◆ How you would involve members in the campaign
- What events will you plan
- What publicity will you need to generate
- What are your key dates

2. Try to identify

Your direct targets – who you are aiming at in your campaign activities

Your indirect targets – people or organisations that may not agree with you completely but can help you put pressure on your direct targets.

Allies – Other individuals or groups that share your views and can assist you – for instance those groups that you identified in activity 2.

In each case think about

- ◆ Who they are
- ◆ What do you want from them
- ◆ What arguments can you use to persuade them to agree with you or assist you
- ◆ How you will get access to them or publicise your case to them

Planning Activity 1 Carrying Out Research

Aims – To identify our information needs
To identify what we need to find out to assist the campaign
To identify useful sources of information

Task :

In your team review the groups conclusions to activity 2 - Finding Information.

Try to identify

What additional information you may need to collect to assist with a campaign in your workplace.

In relation to

- UNISON members/other employees
- Your employer
- Service users, the general public and bodies such as school governors and tenants associations, political representatives such as MPs and local councillors.

Think about

- What you want them to do
- What arguments will you use to persuade them to do it
- What evidence will you need to produce to persuade them to agree with your view of PFI
- How you could use your campaign research.

You may need to collect information on matters like

- The cost of the proposed PFI scheme
- The impact it may have on the services that you provide
- Members likely to be affected by the PFI proposal
- The effect that a PFI scheme might have on members jobs and terms and conditions

Then, when you have defined the information/evidence that you need for your campaign prepare a report outlining

- what it is,
- how you would use it
- why you think it important to use it in relation to the three target groups,
- how you will go about finding it.

Planning Activity 2– Publicity and campaigning

Aims – To look at how we could publicise our case
To plan out publicity events
To begin to use a targeted approach

Task

Your team task is to plan out what sort of publicity and campaign strategy you could use to highlight your objections to PFI and achieve your campaign aims.

Try to identify

What publicity and/or events you could use to pursue your campaign aims in relation to

- UNISON members/other employees
- Your employer
- Service users, the general public and bodies such as school governors and tenants associations, political representatives such as MPs and local councillors.

Think about

- What you want them to do
- What arguments will you use to persuade them to do it
- How you would publicise your case to them
- What events/leaflets/other means of publicising your views you could use
- Who would do what
- How you would fund your campaign
- A campaign and publicity timetable

Then, when you have sketched out answers to the above questions prepare a report outlining your teams conclusions

Planning Activity 3– Involving and Organising Members

Aims : To work out how you will involve members
To work out what you want members to do
To work out how you will keep members informed.

Task : In your team draw up a communications strategy for your branch that outlines

- How you would inform members about PFI
- How you would involve them in the campaign activities
- What you would want them to do
- What publicity you would use to persuade them to do it

You are asked to draw up your communication strategy in outline only, when you have done this prepare a report describing your strategy and setting out

- Who would do what
- When
- How you would keep members informed on a workplace or departmental level
- How you could also use your campaign to improve union organisation at workplace level.

ACTIVITY 4 TIEING IT TOGETHER - DEVELOPING A LOCAL CAMPAIGN PLAN ON PFI

Aims:

- To develop a local campaign plan against PFI
- To use the “twin-track” approach in a campaign strategy
- To do a SWOT analysis of your campaign

Tasks:

Now that you have done some preparatory work it's time to tie it all together and develop a local campaign plan to be put in place over the next 3 months. The aims of your campaign are to:

- Discourage the employer from using PFI
- Raise awareness of the arguments around PFI among members; service users; the general public and interested bodies
- Negotiate a PFI agreement

Task 1

For this activity you will be working as a branch team. Using the information available to you develop a campaign plan to use in relation to the key target groups that you will need to aim your campaign at.

- UNISON members/other employees
- Your employer
- Service users, the general public and bodies such as school governors and tenants associations, political representatives such as MPs.

Keep the “twin-track” strategy in mind when you are developing your campaign strategy. You may be trying to negotiate with the employer to defend your members' interests at the same time as you are campaigning against the employer's PFI proposal.

Task 2

Please write your plan up on a flip chart using the format on the following page. You can use the page in the Coursebook for your own notes.

Task 3

The tutor will help you to draw up a branch team campaign plan that incorporates all the activities identified by groups.

* List the name of the target sub-groups e.g. Trust Board, Members of UNISON, Political representatives, the public.

Notes

ACTIVITY 6 PFI CHECKLIST FOR ACTION

Aims: To draw together what you have learned in the course
To decide on an action plan for your branch.

Preamble

Whether or not your employer has already started the PFI process or there is currently no PFI proposal, there are still things you can do to protect members and the public services in which they work.

Tasks:

Some of the key tasks for unions in dealing with PFI are to

- ◆ Negotiate a PFI Agreement with the employer to ensure early warning of any proposals and union involvement in the process.
- ◆ Raise awareness among members.
- ◆ Obtain information about potential bidders and other PFI contracts.
- ◆ Plan in advance for a branch PFI team.

This forward planning could be crucial in the union's success in challenging PFI proposals.

Working in pairs, make a checklist of the action you can take in your branches to prepare for a potential PFI proposal or combat an existing one.

COURSE REVIEW

Aims:

- To review whether you feel the course has achieved the aims set
- To complete individual evaluation forms

Tasks:

1. Working in pairs or groups of three, look at the aims in the Coursebook and on the flip chart completed in the Introductory Activity and decide whether you feel the course aims have been met.

Please be prepared to report back.

The tutor will give you an evaluation form. Working individually, please complete the form and hand it back to the tutor before you leave.

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