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**CAMPAIGN FUND**

**OPERATIONAL GUIDANCE**

**1 UNISON’s CAMPAIGN FUND OPERATIONAL GUIDANCE**

Payments made in furtherance of the political objects defined in Rule J.1 of the UNISON Rule Book [section 72 of the Trade Union and Labour Relations (Consolidation) Act 1992 applies] are made out of a separate fund of the Union (the Political Fund) which consist of two distinct sections:

The General Political Fund (GPF), known as the Campaign Fund, and the Affiliated Political Fund, known as the Labour Link.[[1]](#footnote-1)

These guidelines explain how the Campaign Fund may be used. Separate arrangements exist for the Labour Link.

It should be noted that the 2016 Trade Union Act resulted in a series of changes to how political funds operate. The main development is that new members have to opt-in to the political fund, and agree to pay an additional 5 per cent on top of their subscription.

This changed context places an extra responsibility on those seeking to use the fund to ensure that bids are for campaign work that is visible and relevant to our members, and which is good value for our money. The operational guidelines aim to help achieve these goals.

**1.1 Status of document**

This document sets out the operational guidance under which the Campaign Fund section of the UNISON Political Fund is administered and organised. It supplements and is governed by the requirements for the Political Fund which are set out in rule J of the UNISON Rule Book.

**1.2 Name and Terminology**

The name of the fund is UNISON’s Campaign Fund. The Campaign Fund is one of two sections of UNISON’s political fund, established at the foundation of UNISON, which continue the traditions of the founder unions and offer members a choice of funds.

**1.3 Aims and objectives**

To utilise its funds to pay for political campaigning at branch, regional and national level; for political research; as well as lobbying at UK Parliament; Scottish Parliament, Welsh Assembly and Northern Ireland Assembly. The Campaign Fund is independent of support for any political party.

To support the policies decided by National Delegate Conference and to work to the union’s priorities as agreed by the National Executive Council each year after consultation with all parts of the union. The Campaign Fund has no policy-making status.

Any branch with members contributing to the Campaign Fund is eligible to apply for financial support from the fund.

The same shall apply to any Service Group, Sector or Region, Self-organised Group, Retired and Young members groups, having members contributing to the Campaign Fund.

**1.4 Overview of the fund**

The union is committed strongly to campaigning in the community on issues concerning the services that our members provide and to campaigning in the community for our political priorities. This has included our work on racism, other equalities issues, transport issues, community health issues, housing, as well as youth festivals, community carnivals, indeed any events where it is possible to get the union’s message across.

We are particularly concerned to try new and innovative ways of putting UNISON’s policies before the public, finding new ways of building community coalitions and using social media/digital technology to reach wider audiences.

The fund has been used, amongst other things, to help branches and regions to campaign against cuts in public services, marketisation/privatisation and attacks on the health service.

The fund also supports the union’s main public service campaigns, such as Public Service Champions and Million Voices and our work on parliamentary liaison which enables access to government, and includes working with a group of MPs to pursue UNISON’s objectives.

The Campaign Fund Committee regularly reviews the criteria for access to the fund. It is concerned to ensure that the fund is spent on political objectives, as originally intended, and not on mainstream union activity. It is also keen to see proposals coming forward, which are innovative and forward thinking.

The Campaign Fund participates in and contributes to the union’s Equality Scheme and is seeking to ensure that 80% or more of bids should have equality targets.

The Campaign Fund Committee will operate in accordance with the union’s agreed Devolution Protocol when encouraging and supporting applications to the fund.

**1.5 Equalities bids**

The Campaign Fund takes a national over-view of equality events, including Prides – seeking to pre-plan and co-ordinate the union’s involvement. This allows for a more consistent approach to both the funding of events and the planning of UNISON’s presence and political message at them.

Equalities bids are considered annually at the Campaign Fund Committee’s February meeting.

All regions are asked to take planned and co-ordinated approach to equalities work supported by the Campaign Fund, avoiding duplication and supporting all SOGs to develop bids as part of a regional programme.

All those making successful equalities bids are required to complete an evaluation form. Follow-up bids will be rejected if an evaluation has not been completed.

**1.6 Membership**

Membership of the UNISON Campaign Fund is available to all UNISON members, as described in the UNISON Rule Book, on the following basis:

- all UNISON members who opt-in can choose whether they want to contribute to UNISON Labour Link, the Campaign Fund, or both, or neither. Application and transfer forms are available from the branch secretary and on-line.

**2 The Campaign Fund Committee**

Members of the Campaign Fund Committee are elected from the Campaign Fund levy payers on the union’s National Executive Council.

The Campaign Fund Committee is entrusted under the rule book with responsibility for overseeing expenditure from the fund. [Rule J 8.2]. It provides an important resource within the union for political campaigning, as well as taking a number of initiatives to positively promote UNISON’s profile.

**2.1 Proportionality and Fair Representation**

To meet the principles of proportionality and fair representation the committee aims to ensure that there is representation from the small service groups and low paid members as well as reflecting the gender balance of the union.

**2.2 Ways of Working**

- The Campaign Fund Committee will elect a Chair and Vice-Chair to manage the workload of the committee [supported by relevant officers of the union].

- The Campaign Fund Committee will meet at least 5 times a year.

- Regions will be advised of meeting dates and deadlines.

- Bids to the Campaign Fund Committee must be received 7 days prior to the date of a meeting.

- The Chair and Vice-Chair will have delegated authority to agree bids of up to £5,000 in exceptional circumstances (between meetings).

- The Committee will agree bids via email between meetings if the Chair and Vice-Chair decide it is appropriate.

**-** The Campaign Fund Committee will provide annual feedback to each Regional Committee, where these exist, and will meet with Regional Convenors and Campaign Fund contacts at least once a year.

- All regions must have procedures to oversee bids, which will be authorised by the Campaign Committee.

- A regional contacts must be appointed.

- Bids must comply with UNISON’s objectives and priorities. All bids will be decided with this in mind.

- Bids received from outside bodies – in general it is expected that an appropriate officer of the union should define the work required to meet a particular UNISON objective/priority and then establish the most appropriate partner to work with. If bids are received direct from an outside body they will be referred in the first instance to the appropriate officer, who will be responsible for submitting the bid with an endorsement as to how the bid supports the relevant work programme.

- All items currently under officer discretion (e.g. Public Service Champions) are required to be re-authorised by the Committee every two years post appointment of new committee.

- The Campaign Fund will have a communications strategy for the year.

**2.3CRITERIA FOR ACCESS TO THE FUND/SUBMITTING BIDS**

The Committee has determined the criteria for applications to the Campaign Fund as follows:

* applications must involve expenditure of a clearly political nature, including campaigns, lobbying, research or other activities, which seek to influence or affect the development of public policy. *The fund should not be used to contribute to mainstream expenditure on pay and conditions work, the general administration of the union or membership services (unless it is political);*
* national level advertising campaigns in support of the union’s objectives and priorities must be agreed by the Committee as part of the annual budget setting process and subject to regular reports to the committee;
* applications must pursue and conform to UNISON policy; be in line with UNISON’s objectives and priorities; benefit the union; be in line with national service group policy;
* applications from within the union must have the support of the branch and be subject to scrutiny by the region;
* applications from external bodies must come in via the appropriate officer and reflect existing union priorities and objectives;
* applications to the fund must only be submitted on the latest official campaign fund form; the form must be returned electronically in PDF format and forwarded on in the post with a signed copy;
* applications for the funding of equality events must be submitted on the equality events form; (see Appendix A.2.4);
* Sponsorship of events: funding will be provided for active involvement in events and should be determined by the purpose which the submitting body can make of the event. [see Appendix 1 for further guidance];
* Funding of staffing posts: Applications must not contain requests for the funding of staffing posts;
* Bid applications must include the financial justification for the sum requested, in a detailed breakdown with expenditure itemised;
* Expenditure incurred in advance of the approval of an application will not be reimbursed and applications must not be retrospective. If a branch or region is facing a tight timetable, then early discussions with national or regional Campaign Fund officers must take place otherwise the application will not be approved;
* Whilst the Committee may consult with other committees and officers the final decision on such matters rests with the Campaign Fund Committee.

**Post- Bid Agreement**

* An acknowledgement of support from the Fund must be carried prominently on any material produced. i.e. Funded by UNISON’s Campaign Fund.
* The Committee will expect a report from bids that have been successful, payments are made on this understanding.
* All under-spends and money that is not required MUST be returned to the central fund. This can’t be used for other purposes or fresh work not included in the original bid.
* Copies of any adverts, publicity, reports or publications funded by the Campaign Fund must be sent to officers.

**3.1 APPLICATIONS FROM BRANCHES**

For all bids; no matter what the amount, branches should complete an application form and submit it to the regional secretary with any supporting material.

Applications up to £5,000 may be approved by the region and notified to the national committee, with a copy of the bid.

Applications above £5,000 will be considered by the region and recommendations made and then sent to the national committee for approval or otherwise. Regions must provide commentary to the Cam,paign Fund committee on why they back the bid.

Where publicity material is involved, it is advised to seek the assistance of the Communications Department.

**3.2 APPLICATIONS FROM REGIONS**

All regional applications, including local groups (i.e. regional Self- Organised Groups, Service Groups), no matter what the amount must be considered by the national Campaign Fund Committee.

Applications must have a covering note from the regional secretary or designated signatory.

Regions with devolved administrations have the option to submit a bid at the start of each year which will identify all scheduled activities (costed) in relation to political campaigning.

**4.1 REGIONAL ARRANGEMENTS FOR DEVOLVED DECISION MAKING (decentralisation January 2004)**

The Campaign Fund criteria for decisions on bids must be applied at all levels of decision making.

* each region should have an established body to scrutinise applications and any lay members involved should be Campaign Fund levy payers. An officer should be appointed as a contact for applications and issues. It will not be sufficient for branch applications to be dealt with as ordinary business on the committee and council meetings cycle;
* regions may approve branch bids to the Campaign Fund of up to £5,000. The Committee is keen to emphasise that under the guidelines, the key determinant should be the measure of how much expenditure on an issue is clearly political, not how to spend up to the limit. Criteria for access to the fund must be applied rigorously – advice may be sought from national Campaign Fund officers;
* there will be no ceiling on the total number of branch bids agreed by each region; funds will continue to be held at national level where applications approved by regions should be forwarded;
* branch bids on issues on which the union has a national strategy will need to be co-ordinated and processed nationally, although regions are likely to have a role. [see Appendix 2 for further guidance]
* bids which meet the guidelines on access to the Fund will be processed at national level and the money made available without delay. If officers question any aspect of a bid, the Chair of the Committee will be invited to make a decision. All expenditure will be reported to the Campaign Fund Committee;
* where a bid involves payment to a local institution for research, there should be some evaluation and review of the quality at national level; [see Appendix 2 for further guidance]
* regions should publicise the system of access to Campaign Fund expenditure to branches;
* information will be made available on the UNISON website;
* the Campaign Fund Committee will review the process annually.

**APPENDIX 1 ‘Sponsorship’ of events/activities**

Bids should seek to demonstrate an active involvement in the relevant event and show clear benefits to the union and its aims, objectives and priorities.

Activities associated with involvement in events should be related to ongoing work by the submitting body and must also identify how the work will be maximised post-event. They should be pro-active and aimed to reach out to members, potential members and the community and provide a ‘voice’ for the union’s policies and campaigns.

Event managers often express stakeholder’s involvement in events as ‘sponsorship’ or they provide a sponsorship package or opportunity. UNISON’s purpose in being involved is not to ‘sponsor’ the body or the event, but to utilise it for the objectives of the union and consequently bids are expected to emphasise our purposes rather than that of the event.

‘Sponsorship’ alone is not a valid activity for consideration by the Campaign Fund.

**APPENDIX 2 Nationally co-ordinated issues and campaigns**

Branch bids on issues on which the union has a national strategy, such as outsourcing, combating the far right, winning the battle for public opinion on austerity, will need to be co-ordinated and processed nationally, although regions are likely to have a role.

**Equality events**

In order to co-ordinate the union’s involvement in equality events, bids in this area are considered as part of an annual overview at the beginning of each year.

It is essential that regions, branches and self-organised groups identify these events at that time and provide sufficient detail of the benefits of involvement to guide the National Campaign Fund Committee in its considerations. Requests must be made using the equality events form.

**Research**

When applicants are considering the commissioning of research or reports they must obtain guidance from the Union’s national Policy department.

**May 2018**

1. The NEC agreed to name the GPF the Campaign Fund at its meeting in February 2018. This followed a union wide consultation on the changes to the fund necessary to ensure compliance with the Trade Union Act. [↑](#footnote-ref-1)