



Supporting our Branches: **The Branch Resources Review**

NEC Report to the UNISON Special
Delegate Conference 2021

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Foreword

Stronger Together

Two years ago, the world was very different. We were all gathered in Liverpool enjoying a lively national delegate conference. Motion 126 called for a review of branch resources – this was duly passed, and it was clear from that the start that there was work to be done.

Our first step was to talk to you – our fantastic activists on the ground. Our union is often reliant upon a key group of branch activists, many holding more than one position. When we surveyed branches back in the spring of 2020, the response from 357 branches told us that to effectively fulfil their role, what branch officers wanted was more time, more regional support and more funding – in that order. As part of the development phase, we visited all regions of UNISON and have spoken to over 1700 activists.

The Branch Resources Review group was made up of 24 lay members from regions and the national executive council (NEC), led by Lilian and myself. We have strived to develop a package of measures that will improve resources to branches and have worked closely with the NEC to develop a package filled with new services, modernised systems and additional funding.

We know that after a decade-long austerity agenda attacking public services, our members and our branches have felt the pressure. To remain steadfast in the face of this onslaught, a strong, united UNISON is needed to deliver for our activists and members. Support for our members comes from reps on the ground to officers in the regions and at UNISON Centre; this collaboration, this common endeavour makes UNISON unique. We are a collective and we are always stronger together.

So, here we are two years later, and the hard work has been done. Lilian and I, on behalf of the working group, are delighted to present to you the branch resources report which has been adopted by the NEC and submitted to Conference for your consideration. We hope that you will support this package of practical measures designed to support all of our branches.

Josie Bird

UNISON president and chair of the
Branch Resources Review

Lilian Macer

Chair of the regional convenor group and
vice chair of the Branch Resources Review

Part one

The review

Introduction

In 2019 UNISON's national delegate conference (NDC) recognised that our branches, which are of paramount importance in providing support for members were facing increasing pressures. The reduction in the number of employers covered by national bargaining arrangements and the significant fragmentation of the workforce served to highlight this trend.

Motion 126 at that conference noted that the topic of branch resourcing had been debated for many years; it was apparent that there was a pressing need to ensure that branches had sufficient, stable and sustainable resource levels and to bring the long-running debate that had started in 2011 to a successful close.

At the 2019 NDC the National Executive Council (NEC) was instructed to conduct a two-year review of activity and expenditure at all levels of the union –to enable the prioritisation of union activity and expenditure, with a view to improving the level and quality of resources available to branches. This review was instructed to reflect the union's agreed objectives based on sound financial governance and ensure the highest levels of financial probity. It also set in place interim branch funding arrangements for the duration of the review.

Alongside all of the organisational data which underpins the rationale for many of the proposals offered; the review group also conducted intensive consultative work, engaging with branches from across the UK throughout the duration of the review; this informed and steered their decision making.

In the spring of 2020, all branches were invited to complete a branch resources survey; 357 branches responded. Branch activists told the review group that they wanted to recruit and retain members, develop activists and support members with representation. To do this, they needed more time, more regional support and more funding – in that order. The survey was followed up with in-depth interviews with a cross section

of branches. This confirmed that what was required was a modern, flexible and supportive union.

The BRR review group met as a whole group twelve times during the review period and in excess of 75 times as four smaller project teams; which exchanged ideas, conducted separate investigations and ultimately designed the package presented to you today.

Moreover, the BRR Review Group consulted extensively, speaking to over 1700 activists across regions, service groups and the Equality Liaison Committee. They consulted with all of the NEC committees including the Development & Organising Committee (D&O), Policy Development & Campaigns Committee (PDCC) and the Finance and Resources Management Committee (FRMC); as well as regularly publishing their proposals and updates in the Activist Digital, on the UNISON website and in U-Magazine.

Extensive engagement and consultation has taken place



This NEC report makes 14 recommendations which are offered as a package of measures that increase support for branches whilst identifying areas in which the NEC can make savings. The review group and the NEC are very clear that any identified savings would be ploughed back into branches. Significantly, the report introduces a new branch funding scheme which incorporates a new Branch Support and Organising Fund as the headline recommendation of the overall package.

Unison Branch Resources Review 2021

→ Motion 126 passed June 2019

→ 2 year review

→ 12 BRR Review Group meetings

→ 76 detailed project meetings

→ 357 branches surveyed

→ 1,700 activists consulted so far

The approach

Motion 126 instructed that the review should be lay member led (full text at Appendix 1). The 24 lay members of the review hailed from the four corners of the union, including representatives from branches in West Sussex, Lanarkshire, Belfast and Chelmsford (full details are available in Appendix 2).

Josie Bird was appointed chair of the review with Lilian Macer as vice chair. 12 members of the NEC were included in the group and one representative from each region. The 24 members were divided into four smaller project teams, referred to as workstreams, each with a dedicated area of focus. The four areas were; branch, regional, national organisation and the funding scheme.

The review group were supported by full time officers.

In conducting their investigations and making the recommendations which form the basis of this report; the review group was guided by the following principles:

- 1 to ensure a fairer distribution of resources to branches
- 2 to make sure branches have enough resources to meet their operational and policy obligations
- 3 to set up processes, procedures and protocols that are fit for purpose, now and in the future
- 4 to ensure the financial stability and viability of the union; and to
- 5 to integrate seamlessly with the wider financial and organisational strategy of the union

Impact of COVID-19

Almost overnight UNISON had to change how it operated to support its hardworking public service worker members – many of whom were directly involved in dealing with the pandemic and its impact within our communities.

It was, however, essential that work on the Branch Resources Review continued. Although there were very few formal meetings in the early weeks of the pandemic, work behind the scenes continued apace.

Review group meetings and all consultations took place online. This not only showed how agile UNISON is, but it presented a fantastic opportunity to widen participation in the review process and ensure that all parts of the union could take part. This new way of working saved time and with the requirement to travel removed allowed for full attendance at meetings and consultation events.

In short, the impact of the COVID-19 pandemic was minimal on the work of the review group and they have delivered a package of proposals designed to support our branches in the challenges they face and begin to develop a more flexible and modern approach to branch support.

Listening to branches and setting priorities

At the outset of the review, the group was keen to ensure that decision-making would be led by good quality data that was independently verifiable and robustly analysed. This was important because the direction of the review, including determining priorities and the eventual proposals in this report, needed to withstand scrutiny and challenge. This approach means that the proposals are well-informed, costed, tested and can be monitored and evaluated over time.

Financial information

To begin with, the review was provided with an in-depth analysis of the union's national and regional expenditure for the period 2013-2019. This data demonstrated that consistently, year-on-year, more than 70% of the union's

national and regional expenditure was spent on directly supporting members and facilitating union democracy. This provided the floor that the group's subsequent recommendations would not fall below.

Additionally, the review group had access to data held on the RMS, the online branch accounting system (OLBA) and the Organising Framework. With over three years' worth of data from nearly all UNISON branches; the Organising Framework proved invaluable in providing not only an overview of how branches engage with UNISON's objectives, but also offered an accurate picture of trends over this period.

Organising Framework

Data from the framework demonstrates that in the average UNISON branch, typically based in a medium-sized local council, only one third of members work in the main workplace with the other two thirds spread across about 100 other employers – in some cases across nearly 250 workplaces.

In this average branch there are perhaps 50 people with some type of activist role but only 20 of them are Employment Rights Act (ERA) accredited or an elected steward. This would suggest a ratio of around 75 members to each steward. A branch will typically have a secretary, treasurer and a chair, but probably not always a young members' officer for example and maybe only one officer responsible for one of the equality positions.

Further, the review group were made aware that an average branch will have general funds (commonly referred to as reserves) in the region of twice its annual income. Moreover, it does not typically formally spend any monies on campaigns, (only about four in 10 branches do). That does not mean the branch is not campaigning – our branches are working to defend jobs and services on a daily basis, and one of the primary aims of this review is to free up activist time to support this workplace campaigning. Not all branches employ staff; however, in branches where they do, this average branch is very likely to spend somewhere in the region of 40% of its central branch funding on staffing, by far their biggest expenditure. The next biggest expenditures were in managing branch administration and then participation at a national level.

Branch feedback

In addition to using the union's data for information about our branches, one of the final pieces of work commissioned by the review group before the UK went into the first lockdown in March 2020, was a comprehensive survey sent to all UNISON branches. The survey results helped the review group understand what branches felt they needed to best fulfil obligations to their members. It also showed where branches wanted to be able to focus and prioritise their work programmes.

Just under half of all branches responded, 357 or 42%, and there was a good range of different sizes of branch from different regions and service groups.

The results showed that most branches thought the union was providing the resources to meet the range of the objectives set out in The Code of Good Branch Practice. However, there were areas where branch officers and activists were feeling the pressure after a decade of austerity; not least in dealing with increasing fragmentation of employers.

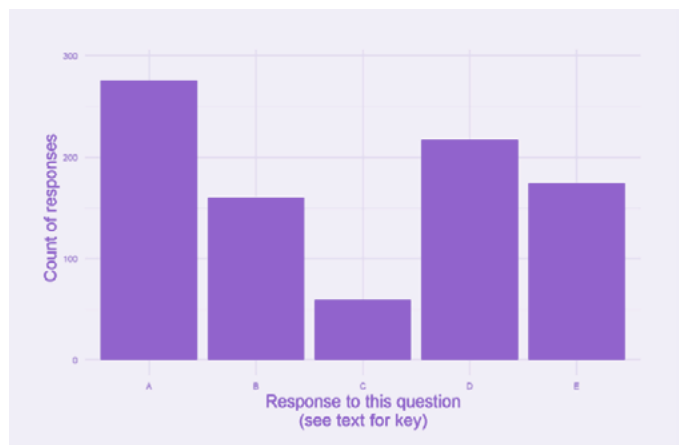
The survey also revealed that the three activities that branches would like to do more of, if they had more resources, were in order:

- 1 Focus on recruitment and retention of new members
- 2 Education of members and activists; and
- 3 Support members with representation and casework.

And lastly, the survey revealed three distinct areas in which branches stated that they needed additional support. These were (in order):

- 1 More time (including facility time)
- 2 More support from regions; and
- 3 More financial support.

Which three of the below would help you most?



- Key:
- A More time (including facility time)
 - B Specific software or systems
 - C Specific equipment
 - D More regional support
 - E More funding

See Appendix 3 for a summary of the main results as well as the breakdown of full results for regional, service group and branch membership size variances. Additionally, the full questions and range of available responses. have also been published on the UNISON website: www.unison.org.uk/content/uploads/2020/11/BRR-Branch-Survey-results-March-2020.pdf

The feedback from the survey highlighted that communications was an issue for many branches – a factor raised by branches in Cymru/Wales, Eastern, Greater London, the North West and the South East.

Participation in the wider union democracy was also an issue raised by branches in the Greater London and South East regions.

The last part of the survey was dedicated to free text answers – allowing branches to freely comment. Some of the issues identified included requests for assistance with IT, training, GDPR issues, information about how the union works, free or cheaper CaseWeb system and social media training. Other issues raised included access to local legal advice, plus accessible, tailored information for branches on the UNISON website.

Listening to branches, it was clear to the review that what is wanted is more practical support and not simply more funding – at least in the first instance.

Interviews with branch officers

To complement the findings of the survey, in the autumn of 2019 the review group commissioned research company BritainThinks to run a set of detailed interviews in branches to investigate what lay behind the survey results. We wanted to understand if there were specific actions which branches felt that the union should be taking to ease the burden felt by some branches. At least one member of the working group joined every interview.

The key findings from the interviews suggested that branches have very different experiences and needs. So, while most branches in the sample felt that their resourcing challenges could not be solved simply by additional funding and instead pointed to time as their most limited resource, a small number in the sample did feel that they would be better served with a direct injection of cash.

The interviews highlighted that branches are operating within a challenging set of circumstances; and that the overwhelming obstacle to running as efficiently as desired was limited time, as casework demands increased on a limited pool of activists who also faced pressure on facility time. Additionally, branches perceived that the internal processes across the union are slow and lead to frustration coupled with a desire for the union to modernise and introduce more centralised IT-driven processes. Finally, there was a plea for more regional support and a greater capacity for regional-level decision-making and flexibility.

It became clear that great importance is placed upon the personal relationship between branches, and their regular contacts at regional and national level. New systems should help and not hinder building effective relations and trust, as that is what is needed to build the organising strength of a trade union.

The survey and interview findings echoed the data held centrally by the union while providing a clear focus for the group as it entered the delivery phase of the review.

Webinars

Representatives of the review group then took to the road – albeit virtually. In a series of branch consultations, with the opportunity to pose questions and provide feedback, activists were encouraged to engage in the refining of the proposals. The package of proposals has been presented to regional council meetings, regional committee meetings and dedicated branch resources review branch briefings. There have been specific briefings on the new branch funding formula and the branch support and organising fund. The proposals have been presented to all the committees of the national executive council, service group committees and the Equality Liaison Committee. This engagement at all levels of UNISON has ensured that the development process of this package of proposals has been robust and thorough.

Conclusion

The data-driven approach to the review has ensured that considerations of how best to balance affordability, effectiveness and feasibility have remained central to determining the review's priorities. And the survey and interviews helped the review group to focus their attention on considering and developing practical proposals to help branches.

A strategic and structural review of UNISON cannot form part of this report as Motion 126 from 2019 was specifically focused on branch resources. Many good ideas received were therefore beyond the remit of the review.

Listening to branch officers has directly shaped the proposals and recommendations offered. We believe we have addressed the motion remit and have proposed a practical package of measures that will help UNISON branches.

Part two

The proposals

The proposals

This section of the report introduces the review group’s proposals. They are centred around the top three priority themes from the survey of branches and subsequent follow-up interviews. These priorities were to help branches:

- find more time;
- improve access to regional resources; and
- improve access to appropriate levels of funding.

The proposals balance affordability, effectiveness and feasibility based on the best evidence available.

For each proposal, information on cost and organisational impact are provided, alongside supporting information about how each corresponds to information gathered from branch interviews or the survey. Each proposal outline finishes with the NEC recommendation to conference.

Table 1: List of proposals and relevance to branch survey priorities

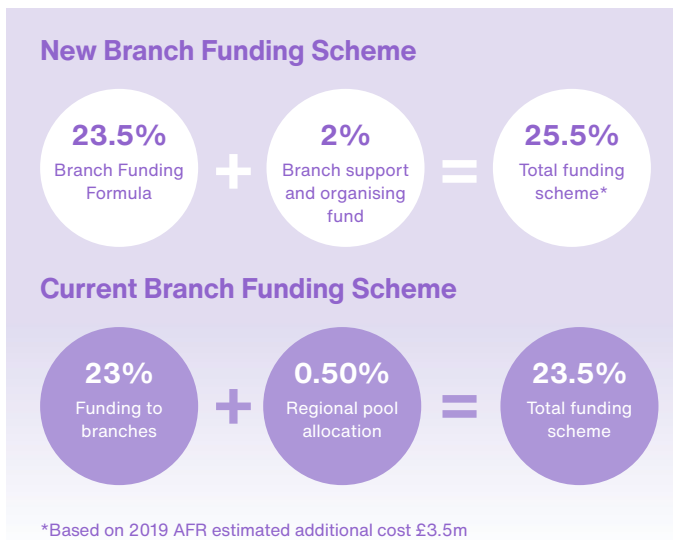
Table showing how the proposals meet the needs identified by branches.

Proposals	T	RS	F
1a New branch funding formula 2021	x		x
1b New branch support and organising fund	x	x	x
2 CaseWeb subsidy	x	x	x
3 New national procurement service for branches	x		x
4 Online meetings	x		x
5 New central conference services	x	x	x
6 Prioritised RMS upgrade	x	x	x
7 New branch service portal	x	x	
8 Bargaining support (improving access and awareness of this resource)	x	x	
9 Online branch expenses module (inside OLBA)	x	x	x
10 Code of Good Branch Practice (Update)	x	x	
11 New facility time strategy and campaign	x	x	x
12 Revamped organising school		x	
13 Affiliation information			x
14 BRR implementation group		N/A	

Key
 T more time
 RS more regional support
 F more funding

Introduction to the new Branch Funding Scheme

The new branch funding scheme is comprised of a new branch funding formula (Proposal 1a) and a new branch support and organising fund (Proposal 1b), as illustrated in the chart below.



The new branch funding scheme:

- 1 Addresses the intent of Motion 126, which was to help branches with low general funds and to consolidate existing financial support into a new package on a permanent basis.
- 2 Introduces more fairness and sustainability into the formula, so as to ensure less disparity between branches; and accepts that branch funds (reserves) built up so far, have been done so in good faith.
- 3 Addresses the growth in the number of employers that branch officers were having to support, due to the fragmentation of the workforce; and
- 4 Recognises that extra money was needed for branch support via the region.

Principles behind the new scheme

The proposed scheme will be:

- a. affordable
- b. sustainable
- c. fair
- d. able to support the current objectives of the union
- e. able to ensure all branches build a stronger and sustainable financial base
- f. able to address the wide disparities in branch general funds
- g. able to ensure the proper running, management and other expenses of a branch are met
- h. in operation for a minimum of 5 years.

Evidence-based approach

The review group analysed branch financial data over the last 15 years for 822 branches.

The data covered the following:

- branch membership
- subscription income
- branch funding
- branch expenditure
- all branch funds
- number of employers.

Overall funding scheme and affordability

The key financial elements of the overall new branch funding scheme are:

Standard entitlement for branches	___ 21%
Additional entitlements for branches	___ 2.5%
Branch Support & Organising Fund	___ 2%
Total package	_____ 25.5%

Overall impact of the proposal

- Overall allocation to branches is increased.
- Branches will be resourced in a way that better meets the union's objectives and the needs of members.
- Redirects additional funding to branches, especially with the creation of the new Branch Support & Organising Fund.

- Allocates increased funding to recognise the significant fragmentation of the workforce.
- Addresses the significant disparities in branch general funds.
- Future proofed to safeguard the future funding and resourcing of all levels of the union.

Conclusion

The proposed new funding scheme meets the objectives set by Motion 126 in 2019 and helps support our branches more and in a variety of ways. Linked to the new Branch Support and Organising Fund, the formula and fund represent a shift towards branches of an extra 2% of national subscription income and will help the union grow and prosper. Furthermore, there are additional measures and proposals in this report that complement the new funding formula and scheme in supporting branch officers to run branches and free up their time to organise and help members.

The detail of the new scheme can be found in the section entitled: new branch funding scheme, it can be found directly before the appendices.

Proposal 1a: New branch funding formula

Financial/organisation impact

Very significant

Feedback from branches

“Fair funding taking into regard branches with too much money and those with less.”

“Any new funding formula needs take into account the additional issues and fragmentation in the community sector.”

Key information about the proposed new funding formula

The following chart shows the proposed formula in detail (text in *italic* signifies a change from the 2001 formula):

The proposed formula in detail

- 21%** Basic entitlement for all branches
 - + up to 4%** membership entitlement
 - + up to 2%** low subscription entitlement
 - + up to 7%** low reserves entitlement
 - + up to 3%** geographic spread entitlement
 - + up to 5.5%** multi employer entitlement – *3 members*
 - up to -1% & 2% in 2025**
Branch General Fund Restriction (BGFR)
- General fund regulator at £12 per member
 - *Increase overall entitlements from 33% to 42.5%*
 - Additional entitlements may be based on the reserves held by the branch

There are a number of advantages to this new branch funding formula, including:

- Increase in basic entitlement from 20% to 21%
- Increase in overall entitlements from 33% to 42.5%

- Addresses the large disparity in reserves, over time
- Deals with high general funds held in branches of circa £59m
- Increases funding to branches with experiencing significant fragmentation of their workforce.

Changes to extra entitlements and other areas

The five main areas of change for an individual branch are:

- a. An increase in the basic standard entitlement from 20% to 21% of subscription income.
- b. An increase in the overall maximum potential entitlement for a branch from 33% to 42.5% of income a year.
- c. That the low reserves entitlement goes up from 2% to a maximum of 7% of income on a sliding scale.
- d. That the multi-employer entitlement goes up from 2% to a maximum of 5.5% of income on a more generous and extended sliding scale. In addition, the threshold for a qualifying employer goes down from five members to three.
- e. A new general fund (reserve) regulator of £12 per member.
- f. A new Branch General Fund Restriction (BGFR) on a sliding scale of up to 1% of will be applied to a branch entitlement. This will apply in the first three years of the scheme so no branch will receive less in funding than the current basic entitlement of 20%. For branches with surplus, general fund balances above £24 per member at the end of Year 3, a straight 2% restriction will be triggered. This will mean their basic entitlement will be 19% in Year 4 (2025). Analysis shows that branches can successfully operate at this level.

The other additional entitlements in the current formula for:

- membership (up to 4%)
- low subscriptions due to a lower paid membership (up to 2%) and
- geographic spread (up to 3%)
- all remain unchanged in the new formula.

Affordability

Should annual funding in any one year fall below 23.5% of total annual subscription income, the balance will be ringfenced for future application towards the branch funding formula but capped and released on a three-year rolling basis to the Branch Support & Organising Fund.

Recommendation

Introduce a new and improved funding formula and scheme for branches (as set out below) which establishes a new Branch Support and Organising Fund at 2% of national subscription income, which would replace the current Regional Pool and Fighting Fund, and a total funding package of 25.5%.

Proposal 1b: New Branch Support and Organising Fund

Financial/Organisational Impact

Very significant. 2% of national subscription income which is approximately £3.3m pa (based on 2019 accounts).

Feedback from branches

“The union recruits in areas with little density as a policy. We need to represent those members but do not have reps there. We need ... help with case work along with organising and recruiting.”

“We need to look after our activists/reps and branch officers please. I recommend extra support from regional/national ...maybe one day a week to help cover cases/representation, organising/recruitment and reps/activists training. thank you.”

The Branch Support and Organising Fund (BSOF) is a new dedicated fund created with the sole purpose of helping branches. This proposal forms part of the new funding scheme.

The new fund, which brings together the best of both the Regional Pool and the Fighting Fund, is available to all branches to:

- 1 support branch, regional and national organising objectives;
- 2 provide enhanced options to branches to support basic representation and casework for members;
- 3 support branches who require equipment; and
- 4 support branches to ensure that members can fully participate in the union's lay democracy.

Key features of the fund will be that it:

- is easy and straightforward for branches to apply;
- allows options for joint branch and fund contributions based on affordability;
- is flexible and transparent about local bids for projects or resources; and

- is overseen by a designated regional lay body that is responsible for clear and transparent decision-making. The funds will be held at the regional level closer to branches. The 2% of national subscription income equates to about £3.3 million on 2019 estimates and this will be higher once 2020 accounts are finalised and up to £3.5 million. The 2% figure will be locked into the new branch funding formula and it can also be topped up on an ad hoc basis. It will be divided between our UNISON regions. Any unspent monies at regional level in a financial year will stay in the fund at regional level to be used in later years as per the current Regional Pool. There will be a national framework but regional lay decision making.

This new fund delivers against all three priorities from the branch survey; namely offering branches opportunities to secure more time for branch officers, receive more regional support and directly offers more funding for branches, collectively and individually. It is designed to help build capacity at a local level to share the load for branch activists and build and grow the union.

Recommendation

Introduce a new and improved funding formula and scheme for branches (as set out below) which establishes a new Branch Support and Organising Fund at 2% of national subscription income, which would replace the current Regional Pool and Fighting Fund, and a total funding package of 25.5%.

Proposal 2: CaseWeb subsidy

Financial/Organisational Impact

Approx. £350,000 pa to subsidise half the overall cost of CaseWeb.

Feedback from branches

“We are in need of a case management system to support reps with representation and case work, but the case management system offered is too expensive for a small branch like ours.”

“Current activists are so overwhelmed with case work there’s insufficient time to recruit new activists.”

UNISON now has its own case system, developed especially to help manage casework. All information can be kept in one place with stewards and branch officers all able to access members’ case information securely anytime, anywhere – and on any device. There is also a live link to UNISON’s membership system, meaning that members’ status and contact details can be verified. Additionally, CaseWeb will in future have a facility time tracker feature built in to help branches. It is the same system that regions use and is currently being rolled out to interested branches.

CaseWeb also supports the union’s green ambitions to lower our carbon footprint commitment as the system links to other systems with the union; it means less paperwork in branches, the ability to transfer cases in real time to regions, and the professional services unit for regulatory body cases.

CaseWeb would ensure the union’s case management system is GDPR compliant and mitigate the risk of data loss or breaches. Therefore, removing the risk of significant fines for the union at local or national level. The advantages of CaseWeb are:

- It is one system used by the whole of UNISON with

all information all in one place; statistics can easily be produced and data trends in casework monitored.

- It is easy to use and works on any device, with a live link to the membership database.
- It supports escalation of cases to regional or national office in one click.
- It is very secure – access is via MyUNISON with password.
- It avoids sending personal data via email or post, thus making the system compliant with General Data Protection Regulation 2018 (GDPR).

Over 100 branches have signed up so far and are all paying £60 per month plus VAT. This is the cost of the licence fee with no mark up. Concerns regarding making CaseWeb mandatory in future, affordability (small branches) and some branches having an independent and efficient system already in place were taken into account.

The review considered an approach to make it free but mandatory for all branches, subject to overall affordability, but rejected this in favour of encouraging take-up on a voluntary basis. Branches without a case system should however consider the UNISON system first. Branches who have systems already should consider CaseWeb and compare it to such a system; if the branch chooses to switch, support with migration will be offered. The new NEC subsidy would be targeted at smaller branches with 2000 members or less, which would mean a cut to £30 per month plus VAT at current 2021 rates.

Recommendation

Subsidise the monthly fees for the new CaseWeb system by 50% for branches who voluntarily subscribe to CaseWeb with 2,000 members or less.

Proposal 3: National procurement service for branches

Financial/Organisational Impact

Initially within existing NEC budgets for early stages but if successful extra resources would need to be allocated.

Feedback from branches

“Support and resources for better procurement nationally rather than branches having to source locally. Support over matters relating to owning and leasing property.”

The review group considered that a union-wide procurement service could be developed using UNISON expertise already in place to offer branches options on the purchase of goods and services. Branches with properties can already receive support from the UNISON Centre. This approach could give savings from economies of scale, save branches time, achieve ethical procurement standards, adhere to the living wage standard, prevent modern slavery in supply chains and conform to environmental standards. The information could be signposted on the new Branch Service Portal (see other recommendation) and include:

- Recommended supplier lists with discounted rates for UNISON customers, around IT provision, equipment, mobile phones, office furniture and supplies.
- Templates and checklists for buying goods and services, to help branches to do ‘due diligence’ on potential suppliers, and ensure contracts are fair.
- Information resources provided online, or via a helpdesk system, to help branches assess and estimate costs of their office accommodation needs prior to entering lease or purchase of properties (although UNISON Trustees’ consent would still be required before committing to any property transaction).
- Exchange of best practice information so branches can learn from each other’s experience, for example in ways to use technology safely, GDPR compliance and for member communications and campaigning.

All proposals are based on voluntary branch participation; there is no compulsion to use the service. The service would develop in stages if there was branch take-up.

Recommendation

Establish a new procurement service to support branches in purchasing goods and services.

Proposal 4: Online/hybrid meetings

Financial/Organisational Impact

Estimated savings of approximately £800,000 pa at regional and national review to support the recommendations of the report. Additionally, time savings for lay activists that can be used in the branch.

Feedback from branches

“Travel time to Cardiff where all meetings are held... significantly [hampers attendance] ... [and] inclusion in these meetings.”

“Zoom meetings should supplement or be blended with union democratic processes – particularly regionally.”

The proposal is to investigate the reduction of the number of physical meetings by learning the lessons of the ongoing COVID-19 pandemic.

In response to the survey of branches, in which branches told us they need more time, holding virtual committee meetings could save not only time but also money at all levels of the union and increase participation. There are key concerns though about reasonable adjustments and access to technology for disabled and low paid members that will need to be addressed.

A quick survey of national committees showed that attendance had gone up with online meetings, but these often had shortened COVID-19 focussed agendas. However, face-to-face meetings help build relationships and solidarity between activists and have a value too.

Online or hybrid meetings where some are in the room and some joining remotely will also help meet UNISON’s environmental and climate change commitments in the year of the UN Climate Change Conference (COP 26) in Glasgow in November 2021. For some national meetings, the time and cost of typically travelling to London can be considerable.

The review felt that all national and regional committees after the pandemic should offer hybrid online and physical attendance at all meetings. National and regional IT and meeting room facilities would need to be reviewed. The National Disabled Members Committee representatives were clear that choice was important, as, though fast improving, the quality of the current online meeting software systems varied widely and none of those available currently meet all the needs of our activists.

Therefore, for the purpose of costing a savings target of approximately £800,000 pa to help fund the report recommendations the group is using an estimate of one meeting in four a year in a completely online environment plus hybrid meetings for the rest of the year as a guide. Each national and regional body would have complete flexibility in their approach and would need to take reasonable adjustments for attendees into account. Some committee chairs have already said that small meetings and sub-committees could easily move to hybrid and online delivery on a case-by-case basis.

The review group will leave to the implementation group, if conference accepts the report, an option to consider setting up a fund to help IT and broadband access for low paid members.

Recommendation

Support online meetings at all levels of the union, recognising any reasonable adjustments necessary, to generate funds to help branches, widen participation and meet our environmental goals.

Proposal 5: Central conference services

Financial/organisational impact

Improved administration for branches saving time and approximately £250,000 savings in the medium term to support the recommendations.

Feedback from branches

“With regards to conferences/seminars etc. I personally found it very difficult to access information on [responsibilities] for booking [accommodation] and travel as every event seems different.”

“With us being remote, attending conferences... often means being out the office for an additional day to travel!”

All UNISON branches could use a centralised booking system for their travel through the union’s national travel provider for national UNISON rulebook conferences to save branches time. The costs would be borne by the UNISON conference office.

Similarly, the national union will trial block booking different hotels at conference venues in advance for delegates obtaining savings and economies of scale via a national provider. Branches would provide their delegate(s) details to the conference office and be offered appropriate hotel room allocation at standard rates in return. Branches or delegates would not have to negotiate hotel bookings themselves, saving time and effort.

The review believes that the concept of a new reasonable adjustments pool to help share and cover the costs for disabled members attending national conferences is a good idea and should be further developed. This would improve participation and mean that branches with disabled delegates are not bearing costs disproportionately. It may result in a small branch levy like the conference creche and if any saving to central budgets occurs these should be transferred to the Branch Support and Organising Fund. The overall aim is to increase participation.

Additionally, the review considered clustering similarly sized conferences one after the other at different times in the year to save time and money for the union. The focusing in on the formal decision-making areas of conference – like motions, speeches and reports – would be maintained and no time lost for lay democracy. This could maximise the time we use at conference to strengthen our democracy. This could potentially take the annual UNISON conference schedule from 36 to 30 days in total. Savings from this option could be £250,000 pa from 2024 (to be re-allocated to branch support) but would need to be carefully planned and involve a lay member group to look at options further.

However, given the ongoing COVID-19 pandemic and the lessons to be learnt, it is recommended that a lay member group from NEC, self-organised groups, young members, retired members and service groups be set up to review the emerging evidence around online motion-based conferences and the above conference scheduling-related proposals. The review group considered but rejected ideas to run conferences online in alternate years after the pandemic.

The review considered the costs associated with seminars attached to conferences and believes the NEC should separate out the costs internally for clarity. Also, the group looked at spend by branches on visitors to UNISON conferences, which totals an estimated £1m a year. A visitor can cost a branch about £200 a day on average according to the conference office. The review group confirmed that this should remain at a branch’s discretion.

National conferences should continue to be held annually in a physical location once safe for delegates and social distancing and other pandemic-related restrictions are lifted.

Recommendation

Confirm physical annual conferences will return after the pandemic and make improvements to UNISON conference arrangements to help branches: such as offering a booking service for hotels and travel; a reasonable adjustment shared pooling fund for disabled delegates; and establish an appropriate lay member group to advise the NEC on other areas of reform.

Proposal 6: RMS upgrade

Financial/Organisational Impact

Cost approximately £2.5m capital investment plus on-going running costs

Feedback from branches

“WARMS is not user friendly and is often incorrect.”

“An easier system to use than WARMS to communicate with members would be a good resource.”

Recommendation

Prioritise the roll-out of the upgrade to the RMS membership system to end the RMS/WARMS divide and support branches with a more modern, flexible and efficient membership system.

In an age when data is king, an upgrade of the Web Access RMS (WARMS) system had, by 2019, become an urgent requirement for a union wishing to operate in an efficient way with 1.3 million members. The RMS upgrade (also referred to as Merlin) project was designed in response to this need and was being considered by the NEC. The review gave additional impetus to the recommendation to implement the upgrade.

Merlin will provide an integrated system for branches, regions and UNISONdirect to use, rather than the WARMS system that branches currently use. The advantages of this upgrade are that Merlin will:

- Provide one system for all, replacing the multitude of systems that have grown and evolved over the past 20 years.
- Enable the adoption of an intuitive Customer Relationship Management (CRM) tool that makes complex transactions simple and does not require hours of training to use.
- Provide clean and reliable membership data, which is not duplicated, incomplete or irrelevant.
- Enable automated workflows and processes which replace manual tasks.
- Improve membership engagement which in turn increases our membership retention.

In effect, the upgrade will end the RMS/WARMS divide creating a union-wide view of member data.

Proposal 7: Branch Service Portal

Financial/Organisational Impact

Prototype developed and will be within existing national budgets going forward.

Feedback from branches

“The latest page on the UNISON website which puts all briefing notes and guidance in one place is really useful. We need to develop national templates in some areas, such as NJC Payline negotiations.”

“Branches, activists and members need accessible tailored information on the main UNISON website and exploring new digital communication, such as apps.”

well as signposting online services such as WARMS, OLBA, the Organising Framework etc. This will include links to available guides, forms, other databases, training courses, templates, bargaining guidance, logos etc. These will need to be devolution-proofed in line with the NEC Devolution Protocol.

An early prototype can be seen here for testing:
<https://branchservice.unison.org.uk/>

Recommendation

To confirm and promote the Branch Service Portal as a web-based hub to help branch officers access key services and information.

The Branch Resources Review survey and interviews with branches identified a need for resources to be available easily for the branch officers and committee members, who may hold many positions and are often active at regional and national level too. Time is precious and respondents were clear that any gains would be spent assisting members and building the branch.

Initial work on a Branch Service Portal has already begun; the proposal is to further develop a central digital environment where branch officers can access all information that may be required in the process of running a branch.

While the long-term plan is for UNISON to continue to upgrade our website and digital presence for member and activist benefit, a short-term solution is required to address the urgent request for support in one place for branch officers and to ensure a professional and consistent approach to running a branch, linked to the Code of Good Branch Practice.

The proposal is to create a central online environment where branch officers can access key information that may be required in the process of running a branch as

Proposal 8: Bargaining Support – improving access and awareness of this resource

Financial/Organisational Impact

Will be managed within NEC budgets.

Feedback from branches

“More guidance on private companies (especially when it is nationally driven, but little advice given). National strategy for SODEXO needs to be looked at.”

“Bargaining guides are very useful.”

The bargaining support unit, based at the UNISON Centre, offers excellent advice and guidance relevant to local bargaining and has a presence on the UNISON website with a page offering different guides, model policies and an email inbox for activists’ queries. The unit can also do private company research of accounts at Companies House and help with statistics and information for pay claims. In addition, the bargaining support unit keep an agreements library for a range of different human resources policies, pay awards and pay scales negotiated with hundreds of different employers. The review group recognise that this service would be beneficial to more branches if it was more widely known and utilised.

Key actions will involve:

- 1 Better promotion of existing guides.
- 2 Gathering regular and insightful feedback on content currently available.
- 3 Continuing to build the bargaining agreements database.
- 4 Creating and delivering resources in line with branch and activists’ needs.

This is mainly a communications challenge alongside a recognition that the service needs to be developed to continue to meet the needs of branches for local bargaining outside of national agreements.

This would assist branch activists save time and give them a good quality technical resource for local bargaining with employers and hopefully deliver results in the long term for the benefit of members locally.

Recommendation

Deliver and promote an enhanced Bargaining Support Service to branches.

Proposal 9: Online branch expenses module (inside OLBA)

Financial/Organisational Impact

None to the NEC, monies found within existing budgets.

Online Branch Accounts (OLBA) is the UNISON tool to assist branches in managing their finances. It supports branches with keeping accurate records of financial transactions as well as helping with building, monitoring and reporting on branch budgets.

The review group would like to fast-track the introduction of an OLBA expenses module which can manage all of the branch expenses process online; from claims through to payments. This module includes an online system in which treasurers can receive claims and pay expenses directly to lay activists by BACS transfer rather than cheque. Additionally, this new module will allow for fewer transactions to be required to clear via bank reconciliations. Full training would be made available and supported by training materials which activists can download or access via the new OLBA online learning platform.

The development of this module will help lay activists and branch treasurers with both time and record-keeping through the established OLBA system.

Recommendation

Provide an online branch expenses system to help activists and treasurers.

Proposal 10: Update the Code of Good Branch Practice

Financial/Organisational Impact

None to NEC Budget, encouragement of good practice.

The Code of Good Branch Practice is a core UNISON document that has the backing of UNISON rule. Its purpose is to guide branches and branch officers on how they should meet the requirements placed upon them by UNISON's rules, and to give guidance and advice on the many practical, constitutional, organisational and procedural issues facing branches.

The in-depth interviews with branch officers confirmed what was already known, that the branch annual general meeting (AGM) process was very long and time-consuming and, though vital for our lay democracy, could be improved. Officers also explained how they had adapted quickly at the start of the COVID-19 pandemic in March 2020 to embrace remote working and online meetings. Some branches did have procedures for online meetings already in their branch rules, but most did not. It seemed common sense to learn lessons and for the code to have some model procedures going forward to aid branches.

Interviews with activists from smaller branches discussed their challenges and there is not a one size fits all approach to UNISON branches and the support they need from regions in various areas. For example, Northern Ireland branches have successful service level agreements with the region for various functions. What the review wanted was for the code to complement the annual Organising Framework discussions and to initiate discussions about whether it would be feasible for branches in a local area to share administrative functions on a voluntary basis: buildings, equipment, facilities and case workers for example. This proposal is about creating space for thinking creatively about branches sharing resources and thus saving time and money and putting some practical examples in the code to this effect.

The Code of Good Branch Practice is being updated under the auspices of the NEC development and

organisation (D&O) committee. Updates recommended by the working group for the D&O to cover are:

- Simplifying and shortening AGM notice periods and branch election procedures.
- Devising a refreshed set of model branch standing orders for online meetings.
- Encouragement of small branches in sharing resources.

Recommendation

Update the Code of Good Branch Practice in three areas: online meeting procedures, easier and quicker arrangements for annual general meetings and encouragement of branches in sharing resources locally.

Proposal 11: New facility time strategy

Financial/Organisational Impact

Will be included in NEC work programmes and budgets.

Feedback from branches

“Workloads are so high we don’t have time to do the branch work we need over a number of employers. Main employer not happy about facility time for other employers or conferences/regional meetings.”

“Lack of facility time to be actively involved in union democracy such as attending regional council, NDC and other meetings is proving to be near of impossible.”

The review group felt that there should be a new national facility time strategy and campaign to help branches win increases at a local level, learn from branches that have won increases and address issues of viability of existing agreements and also where possible seek to win increases and improvements through collective bargaining.

Recommendation

Establish a new national facility time strategy and campaign to improve facility time for lay activists.

The importance of facility time is well known but was also identified in the response to the branch survey as being vital for branch activists to do their job. The regional meetings held on the review confirmed what a priority it was for the union.

From 2010 to the 2016 Trade Union Act, and to the present day there have been specific attacks on public sector facility time from the Conservative Party, employers, the Tax Payers Alliance and the Westminster Government.

However, the Review understood that the issues can vary at a local level and are linked sometimes to a multi-union allocation from an employer. For many of our stewards, especially those who work for private contractors or are based in our community branches, facility time is scarce or non-existent. Additionally, we know that in other service groups, while many branches have facility time agreements in place, these agreements cannot always be relied upon to ensure activists have the time they need to support members. Either their substantive role is not back-filled, so they are left managing multiple workloads, local managers refuse time off or the agreements do not provide for any time outside the core employer, or are restricted to trade union duties but not activities under the ACAS code.

Proposal 12: Organising School

Financial/Organisational Impact

Will be managed within existing NEC budgets.

Feedback from branches

“Members and activists are sometimes put off attending training, committees, briefings and other meetings as they are mainly held in the regional office. The travel time is too much when facility time is challenging. Branches rely on keen enthusiastic reliable activists to run it but, they are difficult to obtain. No resilience in branches either. They are too often reliant on the branch secretary, so they collapse if that individual leaves.”

“More regional/national support and training for senior officers in day-to-day running of branches – e.g. training on managing offices and steward wellbeing, support from full-time officers with mandated requirements, database of information and guidance such as sending delegates to conference.”

“UNISON training is generally pretty good, but it’s not always suited to Community, [...] they can’t lose a day’s wage, that’s a big financial impact. I’m trying to get them to develop bitesize training. They don’t have the technology, [...] a lot don’t have the skill to access it which can be a real barrier, they could pay expenses for training, but we can’t cover the shift they’re missing out on.”

“We can reduce a lot of travel costs with online learning, that’s probably the way to go.”

to travel and ensuring it is appropriately tailored. The interviews came to the conclusion that better online training and resources should be provided; that the training be tailored to the local community and delivered in the closest location, even if that means going to a different branch; that cover for those in training (e.g. through manning office phone lines/casework); covering lost wages for those employed in shift work and support for negotiating leave with employers (through making more training compulsory) be provided.

It has been noted that member development increases activism and the Learning and Organising Services (LAOS) department already provides a wide range of training in a variety of formats with accredited pathways for activists. Information about these courses will be linked via the proposed new Branch Service Portal.

As a result of the COVID-19 pandemic LAOS has developed a suite of online learning packages which has encouraged participation and will be developed further.

The review believes that the NEC work should continue to promote and run training events for activists to ensure that the union continues to meet its target of training all new activists within one year of appointment.

Furthermore, the review recommends that arrangements for a regular national Organising School should be confirmed for after the pandemic in order to grow the number of skilled and experienced reps and stewards in our branches.

Recommendation

Confirm arrangements for regular Organising School events to develop and share lay activist skills.

Successive motions to Conference have recognised the need to embed a culture of learning at all levels of the union, thus improving equality and engagement by our branch members.

Feedback from the branch interviews showed that training could be better supported and facilitated online or in more convenient locations, reducing the need

Proposal 13: Affiliations

Financial/organisation impact

None.

UNISON is affiliated to many organisations, from the TUC to the Labour Research Department (LRD) to Cuba Solidarity Campaign. The NEC policy development and campaigns committee and the international committees both oversee and review these affiliations, and nothing is renewed automatically. All require the organisation to contact UNISON every year and for a written report to go to the committee(s) or be approved under chair's action for fresh affiliation or renewal. The review was informed that European affiliations would be assessed in due course considering EU exit.

We recommend that the national service provider-type affiliations (such LRD, Institute of Employment Rights and Local Government Information Unit) should be better promoted as branch and regional resources. For example, the NEC affiliation to the LRD of £12,000 pa allows them to offer booklets and bargaining guides to UNISON branches at reasonable prices. Further, it is recommended that a list is produced of campaign groups that the NEC affiliates to, or financially supports, so that branches and regions can make informed decisions about whether they chose to affiliate or donate or not.

Recommendation

Publish a list of all UNISON affiliations and supported campaigns to help branches and regions make informed decisions.

Proposal 14: BRR Implementation Group

Financial/Organisational Impact:

No financial impact to the NEC.

A small lay member group comprised of activists from both the NEC and regions should be established to oversee the implementation of the agreed actions of this report and motion.

The group will be concerned with, for example, ensuring that effective implementation arrangements are in place for the new branch funding scheme, including the Branch Support and Organising Fund. It will also have regard to the Devolution Protocol and any equality impact considerations. Finally, the group will be interested in seeing that many recommendations of this report are fully realised and that branches are benefitting.

Recommendation

To establish a small lay member group from both the NEC and regions to oversee, review and evaluate the implementation of the report.

Recommendations

The fourteen recommendations of this report are as follows:

To implement the following five points from the start of the next financial year (1 January 2022):

- 1 introduce a new and improved funding formula and scheme for branches (as set out below) which establishes a new Branch Support and Organising Fund at 2% of national subscription income, which would replace the current Regional Pool and Fighting Fund, and a total funding package of 25.5%;
- 2 subsidise the monthly fees for the new CaseWeb system by 50% for branches who voluntarily subscribe to CaseWeb with 2,000 members or less;
- 3 establish a new procurement service to support branches in purchasing goods and services;
- 4 support online meetings at all levels of the union, recognising any reasonable adjustments necessary, to generate funds to help branches, widen participation and meet our environmental goals;
- 5 confirm physical annual conferences will return after the pandemic and make improvements to UNISON conference arrangements to help branches: such as offering a booking service for hotels and travel; a reasonable adjustment shared pooling fund for disabled delegates; and establish an appropriate lay member group to advise the NEC on other areas of reform;

And to implement the following recommendations as soon as possible:

- 6 prioritise the roll-out of the upgrade to the RMS membership system to end the RMS/WARMS divide and support branches with a more modern, flexible and efficient membership system;
- 7 confirm and promote the Branch Service Portal as a web-based hub to help branch officers access key services and information;

- 8 deliver and promote an enhanced Bargaining Support service to branches;
- 9 provide an online branch expenses module to help both activists and treasurers;
- 10 update the Code of Good Branch Practice in three areas: online meeting procedures, easier and quicker arrangements for annual general meetings and encouragement of branches in sharing resources locally;
- 11 establish a new national facility time strategy and campaign to improve facility time for lay activists;
- 12 confirm arrangements for regular Organising School events to develop and share lay activist skills;
- 13 publish a list of all UNISON affiliations and supported campaigns to help branches and regions make informed decisions;
- 14 to establish a small lay member group from both the NEC and regions to oversee, review and evaluate the implementation of the report.

Finally, conference agrees to replace the 2001 branch funding formula and scheme with the following new formula and scheme as set out in the NEC report:

New branch funding scheme

Section A – General Arrangements

Implementation

1) These new arrangements for the funding of total annual subscription income to branches will apply from 1 January 2022.

Fixed Allocation to Branches

2) Each financial year a fixed percentage of total annual subscription income should be allocated to these arrangements.

Section B – The Overall Structure of the Funding Arrangements

- 3) Funding of branches should be achieved by one or more of the following:
- A standard percentage entitlement.
 - Additional percentage entitlements.
 - Additional funding drawn from a Branch Support and Organising Fund and managed at regional level.
 - Special funding managed at national level to meet the needs of branches with identified exceptional circumstances.

All percentage entitlements to branch funding will be expressed as a percentage of total annual subscription income relating to the branch.

Section C – Special National Funding

4) Branches with continuing exceptional needs may request special funding. All requests for special funding should be submitted to the National Executive Council. Special funding payments will not be considered part of the percentage of total annual subscription income allocated to branch funding.

Section D – Additional Entitlements

Membership Numbers

5) Additional entitlement for the number of members in the branch will be as follows:

Membership	Additional Entitlement
Up to 500	4%
501 – 3000	2%
over 3000	2.5%

Where a branch will be entitled under this formula to a lesser amount in cash terms than that to which it would be entitled if its membership were the maximum of a lower membership band, then for the purpose of this part of the formula its membership will be treated as the maximum of that lower membership band.

The additional entitlement for membership will be based on branch membership at the previous 31 December.

Low Subscription Income

6) An additional entitlement will be allocated to branches according to the following:

Average subscription income per member	Additional Entitlement
More than 10% and not more than 20% below national average	0.5%
More than 20% and not more than 30% below national average	1.0%
More than 30% and not more than 40% below national average	1.5%
More than 40% below national average	2.0%

The additional entitlement for low subscription income will be based on branch membership at the previous 31 December and branch total annual subscription income for the previous year.

Reporting low subscription income bands to Conference

7) Each year the bands for low subscription income will be reported to the preceding National Delegate Conference. The bands will be shown as monetary sums rounded to the nearest pound. From 2022 the bands will be calculated using actual total annual subscription income and membership numbers contained in the financial statements presented to that National Delegate Conference.

For 2022 the following bands will be used based on the total annual subscription income for 2020 of £171 million and the total membership at 31st December 2020 of 1.24 million, giving a national average subscription income figure per member of £138.

Branch average subscription income per member	Additional Entitlement
Less than £124 and not less than £110	0.5%
Less than £110 and not less than £97	1.0%
Less than £97 and not less than £83	1.5%
Less than £83	2.0%

Low Branch General Fund Reserves Entitlement

8) An additional entitlement will be allocated to branches according to the following:

Per Capita General Fund Branch Reserves*	Additional Entitlement
Less than 80% and not less than 70% below the branch general fund regulator **	0.5%
Less than 70% and not less than 60% below the branch general fund regulator **	1.0%
Less than 60% and not less than 50% below the branch general fund regulator **	2.0%
Less than 50% and not less than 40% below the branch general fund regulator **	3.0%
Less than 40% and not less than 30% below the branch general fund regulator **	4.0%
Less than 30% and not less than 20% below the branch general fund regulator **	5.0%
Less than 20% and not less than 10% below the branch general fund regulator **	6.0%
Less than 10% below the branch general fund regulator **	7.0%

* (As defined in recommendation 9)

** (As defined in recommendation 10)

Definition of 'Branch General Fund Reserves'

9) Branch General Fund Reserves will be defined as all funds held in branch general funds, excluding fixed assets, as at 31 December in the preceding year. For the purpose of the calculation the following dedicated funds will be excluded for the calculation of branch general fund reserves:

- a) All monies held in industrial action/hardship funds as at 31 December 2000.
- b) All monies transferred into industrial action/hardship funds from 31 December 2000 which have been raised as a result of local levies.
- c) Any other dedicated fund comprising exclusively of monies raised by local levies.
- d) Any dedicated fund established with the agreement of Regional Committee or endorsed by that committee the purpose of which is future purchase (freehold or leasehold or planned and preventative maintenance) of property provided that:
 - i) The dedicated property fund has been established as a result of a decision of a quorate general meeting of the branch:
 - ii) The dedicated property fund has been established or endorsed as part of a structured financial plan endorsed by the Regional Committee.
 - iii) Transfers into and out of the dedicated property fund must be in accordance with the agreed structured financial plan.

Each year branches will be required to report on the authorised dedicated property funds in their Annual Financial Return as required by national Rule G.10.1.

Definition of Branch General Fund Regulator

10) The Branch General Fund Regulator is calculated as the equivalent of four months total branch funding divided by the total membership of the union. This is currently £11 but for the purposes of the scheme it has been set at £12.

Therefore, the bands for 2022 will be:

Per Capita General Fund Branch Reserves*	Additional Entitlement
Less than £11.40 and not less than £10.80	0.5%
Less than £10.80 and not less than £9.60	1.0%
Less than £9.60 and not less than £8.40	2.0%
Less than £8.40 and not less than £7.20	3.0%
Less than £7.20 and not less than £6.00	4.0%
Less than £6.00 and not less than £4.80	5.0%
Less than £4.80 and not less than £3.60	6.0%
Less than £3.60	7.0%

Geographic Spread

11) An additional entitlement will be available to branches according to the following:

Branch Membership numbers	Additional Entitlement
10% or more, further than 10 miles from the agreed central location of the branch	1%
OR	
10% or more, further than 30 miles from the agreed central location of the branch	2%
OR	
10% or more, further than 50 miles from the agreed central location of the branch	3%

For the purpose of the calculation the central location will be either the main branch office or the location with the largest number of members as agreed with the regional committee.

Branches with Multiple Employers

12) An additional entitlement will be available to branches according to the following:

Number of employers with at least 3 members each	Additional Entitlement
5 to 19 Employers	0.5%
20 to 34 Employers	1.0%
35 to 49 Employers	1.5%
50 to 99 Employers	2.0%
100 to 149 Employers	2.5%
150 to 199 Employers	3.0%
200 to 249 Employers	3.5%
250 to 299 Employers	4.0%
300 to 349 Employers	4.5%
350 to 399 Employers	5.0%
400+ Employers	5.5%

For the purpose of this calculation employers will be defined as independent legal entities. The number of employers in each branch will be as at 31st December in the previous year.

Section E - Restrictions

A sliding scale for restrictions to entitlements

13) For branches with more than 500 members additional entitlements will be reduced according to the following:

Branch General Fund reserves expressed as an average per member	Percentage reduction in additional entitlements
At Branch General Fund Regulator or below	0%
More than Branch General Fund Regulator and less than or equal to 10% above Branch General Fund Regulator	20%
More than 10% above Branch General Fund Regulator and not more than 20% above Branch General Fund Regulator	40%
More than 20% above Branch General Fund Regulator and not more than 30% above Branch General Fund Regulator	60%
More than 30% above Branch General Fund Regulator and not more than 40% above Branch General Fund Regulator	80%
More than 40% above Branch General Fund Regulator	100%

For branches of less than 501 members additional entitlements will be reduced as follows:

Total Branch General Fund reserves	Percentage reduction in additional entitlements
At 500 times Branch General Fund Regulator or below.	0%
More than 500 times Branch General Fund Regulator and not more than 10% above 500 times Branch General Fund Regulator	20%
More than 10% above 500 times Branch General Fund Regulator and not more than 20% above 500 times Branch General Fund Regulator	40%
More than 20% above 500 times Branch General Fund Regulator and not more than 30% above 500 times Branch General Fund Regulator	60%
More than 30% above 500 times Branch General Fund Regulator and not more than 40% above 500 times Branch General Fund Regulator	80%
More than 40% above 500 times Branch General Fund Regulator	100%

General Fund reserves will be as defined in recommendation (9).
The Branch General Fund Regulator will be as defined in recommendation (10).

Reporting restriction bandings to Conference

14) Restriction bandings for a particular year shall be reported to the preceding National Delegate Conference as a monetary sum and shall be calculated from the Branch General Fund Regulator rounded to the nearest penny.

For branches of more than 500 members

Branch General Fund reserves expressed as an average per member	Percentage reduction in additional entitlements
At £12 or below	0%
More than £12.00 and less than or equal to £13.20	20%
More than £13.20 and less than or equal to £14.40	40%
More than £14.40 and less than or equal to £15.60	60%
More than £15.60 and less than or equal to £16.80	80%
More than £16.80	100%

For branches of less than 501 members

Total Branch General Fund reserves	Percentage reduction in additional entitlements
£6,000 or below	0%
More than £6,000 and less than or equal to £6,600	20%
More than £6,600 and less than or equal to £7,200	40%
More than £7,200 and less than or equal to £7,800	60%
More than £7,800 and less than or equal to £8,400	80%
More than £8,400	100%

General Fund reserves will be as defined in recommendation (9).
The Branch General Fund Regulator will be as defined in recommendation (10).

Section F – High Branch General Fund Restriction

15) An additional restriction will apply to a branch's entitlement where their general funds are more than 40% above Branch General Fund Regulator.

Branch General Fund reserves expressed as an average per member	Percentage reduction in entitlement for the years 2022–2024	Percentage reduction in entitlement from 1 January 2025
At £16.80 or below	0.0%	0.0%
More than £16.80 and less than or equal to £18.00	0.2%	0.2%
More than £18.00 and less than or equal to £19.20	0.4%	0.4%
More than £19.20 and less than or equal to £20.40	0.6%	0.6%
More than £20.40 and less than or equal to £21.60	0.8%	0.8%
More than £21.60	1.0%	1.0%
More than £24.00	–	2.0%

Section G – Participation

16) A branch's funding entitlement will be reduced by 2.5% if the branch is not represented at National Delegate Conference in the year to which funding applies by at least 50% of its delegate entitlement. The 2.5% reduction in funding for non-attendance at National Delegate Conference will be reduced by 0.5% for each of the following:

- a. if the branch is represented at a service group conference in the 12 months to June 30th in the year to which funding applies with at least 50% of its delegate entitlement ;
- b. if the branch is represented at regional council in the 12 months to June 30th in the year to which funding applies;
- c. if one or more self-organised groups exist within the branch and any of them have been represented at the respective self-organised groups' national conference in the 12 months to 30 June in the year to which funding applies. Where branches are grouped for the purposes of participation in a self-organised group conference the reduction shall be reduced according to a formula 0.5% multiplied by branch membership divided by group membership.

Appeals against reduction in funding for non-attendance at National Delegate Conference will be adjudicated by the National Executive Council and the Subscriptions Appeals Committee taking account of a recommendation from the regional committee.

Section H – The Branch Support and Organising Fund

17) A Branch Support & Organising Fund will be established from which additional allocations may be made to branches. The annual sum allocated to the Branch Support & Organising Fund will be 2% of total subscription income.

The Branch Support & Organising Fund will be allocated to Regions according to a formula determined by the National Executive Council.

18) The Branch Support & Organising Fund will be distributed by the regional committee or other body delegated by the regional committee using guidelines

to be issued by the National Executive Council. Each Region will establish an appeals sub-committee of the regional council to resolve disputes between the regional committee and branches in respect of allocations from the Branch Support & Organising Fund. Any unresolved disputes at regional level on funding may be referred in writing to the National Executive Council whose decision will be binding.

19) The National Executive Council shall have the discretion to make a supplementary allocation to the Branch Support & Organising Fund in any year. This supplementary allocation will not be considered to be part of the fixed proportion of total annual subscriptions income allocated to Branch Funding.

Section I – The Standard Entitlement and the Fixed Proportion of Total Annual Subscription Income

20) The standard entitlement will be 21% of total annual subscription income.

21) The fixed proportion of total annual subscription income allocated to the branch funding formula each year will be 23.5% and a further 2% to the Branch support Organising fund, making a total of 25.5%.

22) Should the branch funding formula in any one year fall below 23.5% of total annual subscription income, the balance will be ringfenced for future application towards the branch funding formula but capped and released on a 3-year rolling basis to the Branch Support & Organising Fund.

Part three

The Appendices

- Text of motion 126 from NDC 2019
- Branch Resources Review (BRR) Working Group membership
- BRR 2020 Survey of Branches – results summary

Appendix 1: Motion 126 from NDC 2019

126. Resourcing our branches – a UNISON priority

Carried as Amended: 126.2

Conference notes that UNISON's branches are of key importance in the provision of support for members and their responsibilities are ever increasing. The reduction of employers in national bargaining arrangements and the significant fragmentation of the workforce point to this trend.

Many branches now deal with hundreds of employers, receiving no consolidated facility time and no additional resource.

Conference notes that the topic of branch resourcing has been debated for many years but there is now a pressing need to ensure branches have sufficient stable and sustainable resource levels.

As demands on the whole union increase, consideration now needs to be given to how the union as a whole is funded, so that branches can be resourced in a way that better meets the union's objectives and the needs of members with particular reference to direct organisational support for branches.

Conference therefore calls on the National Executive Council to ensure:

- 1 That a review of activity and expenditure at all levels of the union – national, regional and branch-level – is conducted to enable the prioritisation of union activity and expenditure with a view to redirecting additional resource to branches. This review will ensure that all UNISON spending, including the regional pool allocation, reflects the union's agreed objectives, is based on sound financial governance and ensures the highest levels of financial probity;
- 2 This review will be lay-member led and will commence immediately following Conference and be completed within two years. The review will be conducted by a review group comprising 12 members of the National Executive Council and one representative from each region;

- 3 Until completion of the review and agreement by Conference, an amended scheme of funding will be effective from 1st January 2020, based on the following principles for increasing branch funding:
- a. For branches with reserves at or greater than £16 per member, the current funding formula will continue to apply. No branch will receive a lower level of funding than under the current funding formula;
 - b. Branches with reserves less than £16 per member will receive an increase in the standard entitlement of total annual subscription income from 20% to 25%;
 - c. If a branch holds reserves under £16 per member, and an increase in the standard entitlement would take the branch above £16 per member in reserves, that branch will only receive that portion of the increase in the standard entitlement which would take them up to £16 per member in reserves.
- 4 That all additional percentage enhancements for branches with reserves below £16 per full member at the annual point of calculation will remain unchanged, except for 'Number 12: Branches with Multiple Employers' which will be amended effective from January 1st 2020 as follows:
- i) The number of employers relevant for the calculation will be employers which are defined as independent legal entities which have 5 or more UNISON members;
 - ii) Additional entitlements will follow these amended bandings:
 - A. More than 5 and less than 20: 0.5%;
 - B. More than 19 and less than 35: 1.0%;
 - C. More than 34 and less than 50: 1.5%;
 - D. More than 49 and less than 100: 2.0%;
 - E. More than 99 and less than 150: 2.5%;
 - F. More than 149 and less than 200: 3.0%;
 - G. More than 199 and less than 250: 3.5%;
 - H. More than 249 and less than 300: 4.5%;
 - I. More than 299 and less than 350: 5.0%;
 - J. More than 349 and less than 400: 5.5%;
 - K. More than 399: 6.0%.
 - iii) If a branch holds reserves under £16 per member, and an increase due to their multiple employer entitlement would take the branch above £16 per member in reserves, that branch will only receive that portion of the increase which would take them up to £16 per member in reserves;
- 5 To align with the current branch funding formula, for branches with less than 501 members an absolute reserves base of £8,000 will be used instead of £16 per member;
- 6 That the Activity-Based Budgeting system of budget 'top-ups' agreed at National Delegate Conference in 2016 will be deleted, in favour of the funding increase set out in points 3-5 above.
- 7 That the Regional Pool, under lay member control at Regional level, can continue to provide additional funding allocations to branches in support of UNISON's organising agenda. During the period of the amended scheme of funding which will be effective from 1 January 2020 (outlined at point 3 above), the total funding allocation to the Regional Pool will be protected at the 2019 level of funding allocation to the Regional Pool.

Appendix 2: Branch Resources Review Working Group membership

Regions (12 places)

James Large (Northern Ireland) ***
Mark Chiverton (South East)
Yvonne Green (Greater London)
Wendy Nichols (Yorkshire and Humberside)
Lillian Macer (Scotland, Vice Chair)
Sue Brealey (West Midlands)
James Minto (East Midlands)
Nicky Ramanandi (Northern)
Becky Tye (Eastern)
Trudie Martin (South West) *
Glen Williams (North West) **
Peter Crews (Cymru/Wales)

National Executive Council (12 places)

Josie Bird (Chair)
Alastair Long
Davena Rankin
Steve North
Dan Sartin
Gordon McKay
Kendal Bromley-Bewes
Denise Thomas
Maureen Le Marinel
Sian Stockham
Chris Tansley
James Anthony

Secretary to the Review

Emilie Oldknow (Assistant General Secretary)

* Trudie Martin replaced Bernadette Yea in August 2020

** Glen Williams replaced Pat McDonagh in August 2020

*** James Large replaced the late Denis Keatings in October 2020

Appendix 3: Branch Survey – summary of results

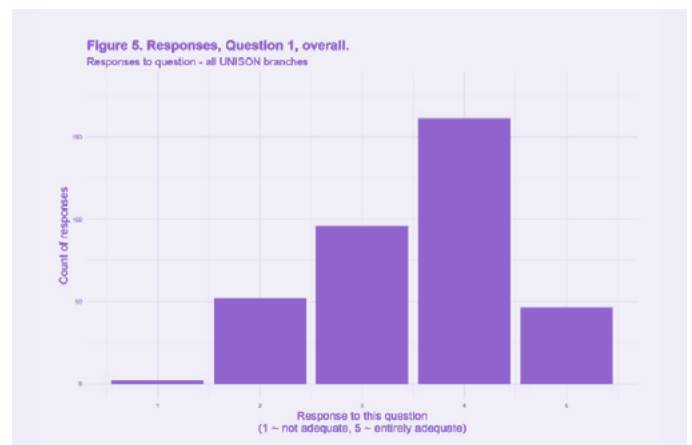
The full results from the 357 branches who responded with regional and service group breakdowns are on the UNISON website:

www.unison.org.uk/content/uploads/2020/11/BRR-Branch-Survey-results-March-2020.pdf

This summary gives the main results to each question.

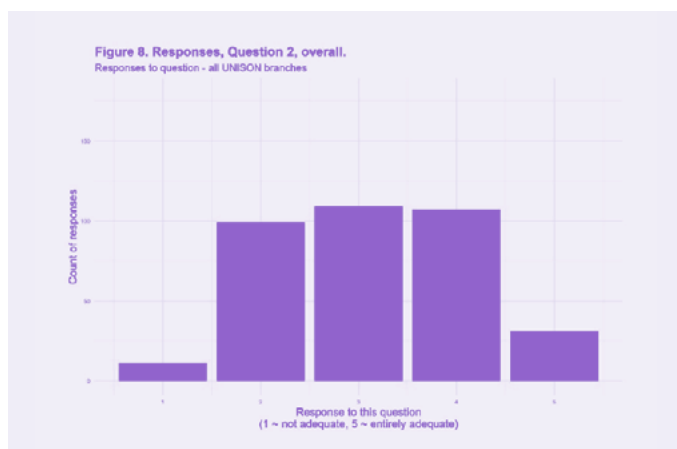
Question 1: support and advice to participate

Question 1 asked “To what extent do available resources allow you to ensure members in your branch are aware of and know how to access the broad range of support, assistance, advice and opportunities to participate in the union?” A response of 1 meant “not at all”, and a response of 5 meant “completely”.



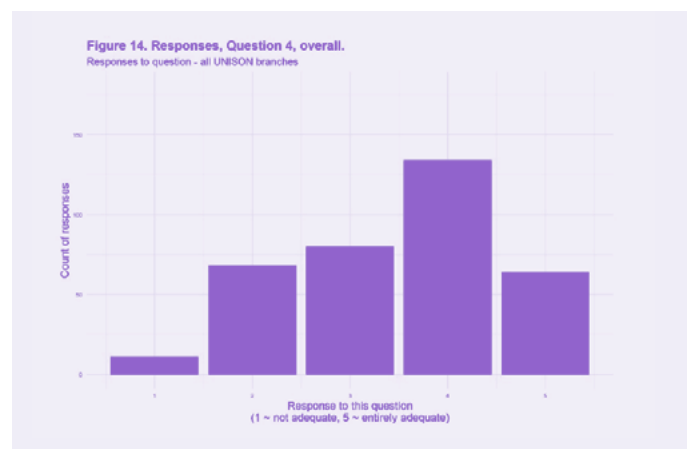
Question 2: recruit, retain, and organise

Question 2 asked “To what extent is being able to recruit, retain and organise members and local representatives adequately supported by the systems and resources UNISON makes available to your branch?” A response of 1 meant “not at all”, and a response of 5 meant “completely”.



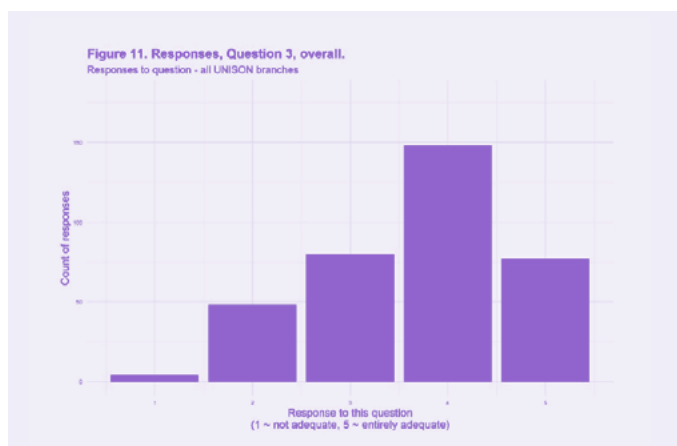
Question 4: bargaining & negotiation

Question 4 asked “To what extent is the branch’s ability to bargain and negotiate with local employers on conditions of service, pay, employment changes, etc, supported by the systems and resources UNISON makes available to your branch?” A response of 1 meant “not at all”, and a response of 5 meant “completely”.



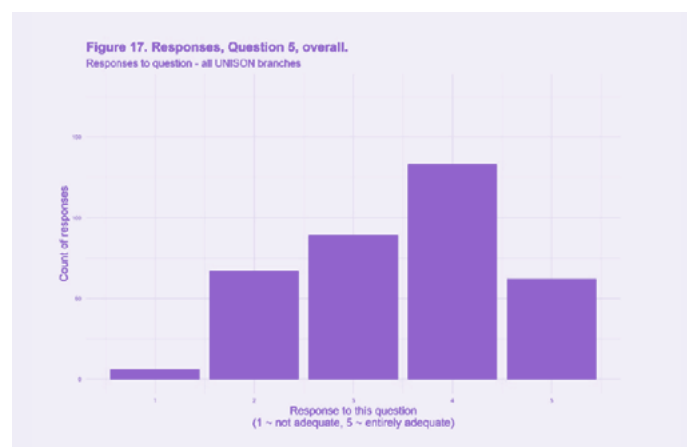
Question 3: grievances & disciplinary

Question 3 asked “To what extent do you have the right systems and resources to advise members about how to resolve grievances and disciplinary issues”. A response of 1 meant “not at all”, and a response of 5 meant “completely”. The responses are as shown below in Figure 11, which does not provide a breakdown by region or service group. Figure 12 shows a breakdown by UNISON Region, and Figure 13 shows a breakdown by UNISON Service Group.



Question 5: employer consultations

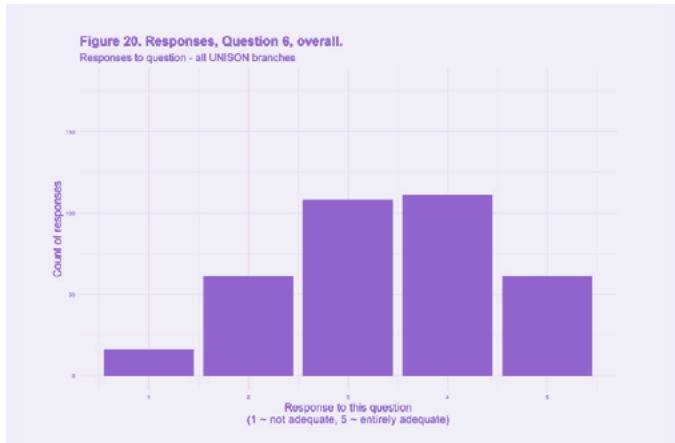
Question 5 asked “To what extent do available resources allow the branch to respond to consultations from employers?”. A response of 1 meant “not at all”, and a response of 5 meant “completely”.



Question 6: health & safety

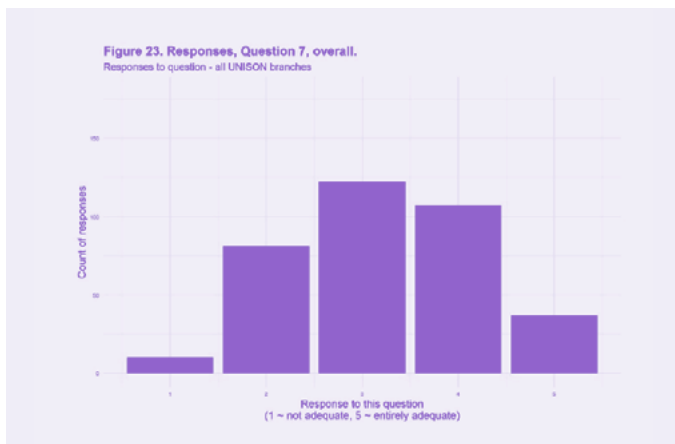
Question 6 asked “To what extent is the branch’s ability to represent members on health and safety matters

supported by the systems and resources UNISON makes available?” A response of 1 meant “not at all”, and a response of 5 meant “completely”.



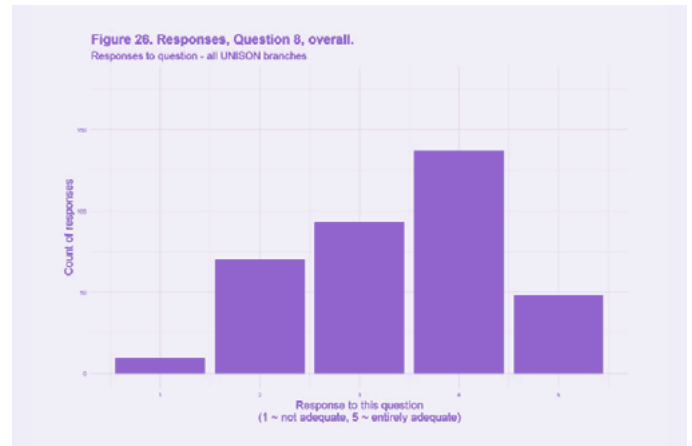
Question 7: campaigning

Question 7 asked “To what extent does UNISON provide the right resources to enable the branch to campaign in accordance with UNISON policy?”. A response of 1 meant “not at all”, and a response of 5 meant “completely”.



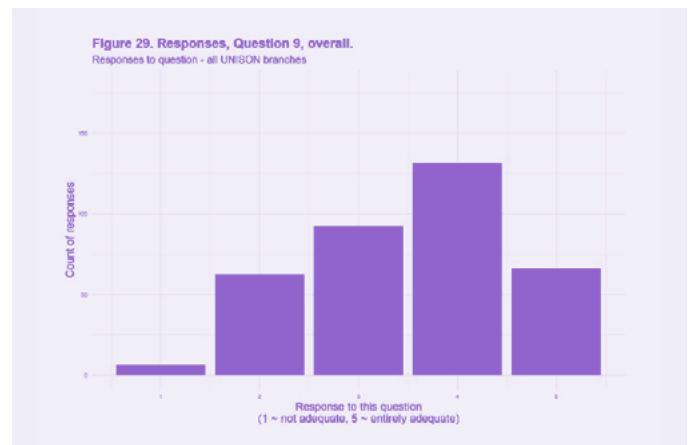
Question 8: communications with members

Question 8 asked “To what extent do available resources and systems allow the branch to maintain regular communications and consultations with members?”. A response of 1 meant “not at all”, and a response of 5 meant “completely”.



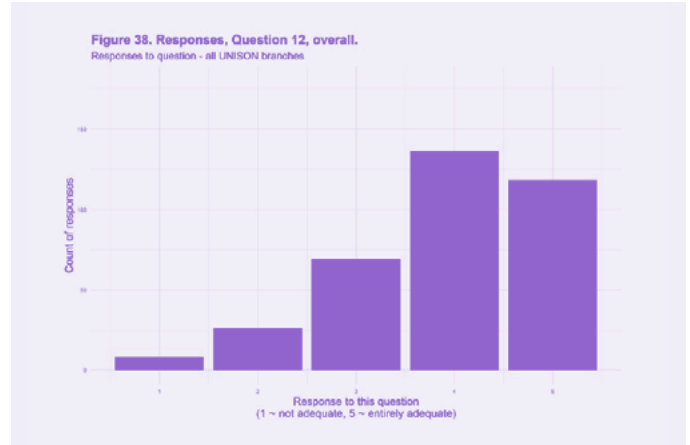
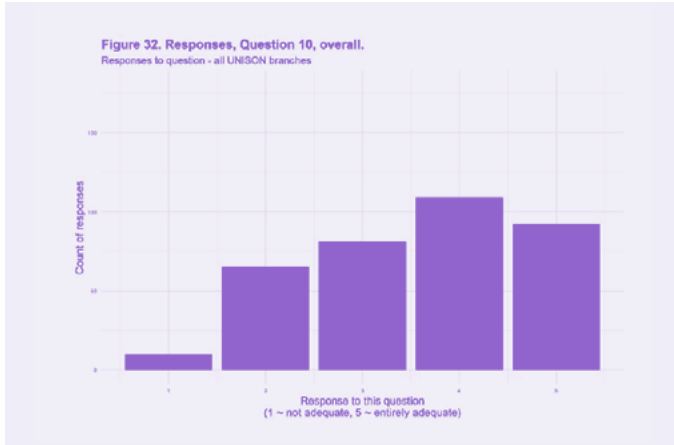
Question 9: education & development

Question 9 asked “To what extent do available resources allow the branch to support the education of members and the development of activists?”. A response of 1 meant “not at all”, and a response of 5 meant “very well”.



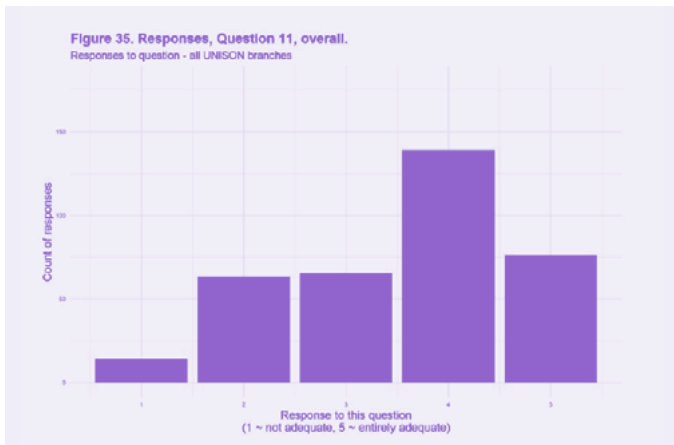
Question 10: democratic participation

Question 10 asked “To what extent do available resources allow the branch to support the education of members and the development of activists?”. A response of 1 meant “not at all”, and a response of 5 meant “completely”.



Question 11: membership administration

Question 11 asked “To what extent does the branch find it easy to keep membership records up to date through the WARMS (web access RMS) system provided by UNISON?”. A response of 1 meant “not at all”, and a response of 5 meant “very easily”.



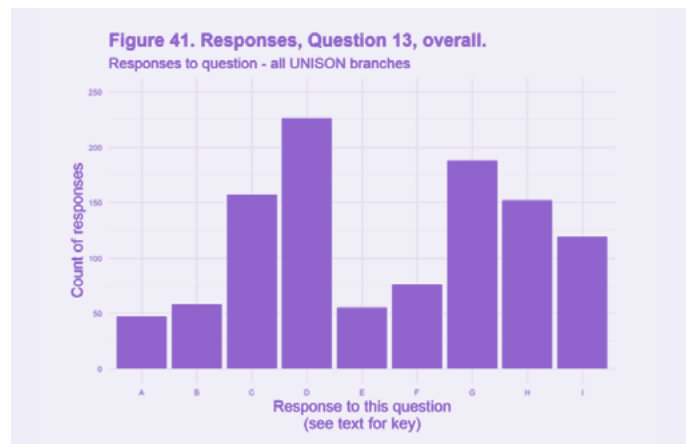
Question 12: financial administration

Question 12 asked “To what extent do the systems provided by UNISON (including OLBA) allow the branch to manage its finances effectively?”. A response of 1 meant “not at all”, and a response of 5 meant “very well”.

Question 13: of what would you do more?

Question 13 had a different structure and asked Branches “Please pick from the following list the top THREE activities that your branch would like to do more of if it had the resources - time, systems, support, and finance – to do them effectively?”. The eight options provided were (with the code used to represent them in the charts below):

- 1 Negotiating with employer on pay and conditions;
- 2 Participating in union democracy;
- 3 Supporting members with representation and casework;
- 4 Recruiting and retaining new members;
- 5 Responding to employer consultations;
- 6 Improving health and safety;
- 7 Educating members and developing activists;
- 8 Communicating and consulting with members.



Question 14: what do you need in order to do more?

Question 14 also had a different structure and asked Branches, considering their answer to Question 13, “For the three priorities you identified above, considered together, which THREE of the below would help you most?”. The purpose of this question design was to encourage branches to think explicitly in terms of the issues which they identified as priorities. The five options provided were:

- 1 More time (including facility time);
- 2 Specific software or systems;
- 3 Specific equipment;
- 4 More regional support;
- 5 More funding.

