

Introduction

Summary Report – May 2021

[Motion 72](#) and the National Executive Council (NEC) Report '[Supporting Our Branches: The Branch Resources Review](#)' is the result of a two year review which began in the summer of 2019. In the National Delegate Conference (NDC) of that year, Conference recognised that due to the reduction of employers in national bargaining arrangements and the significant fragmentation of the workforce that the workload in providing support for members had increased.

Motion 126 at that conference noted that the topic of branch resourcing had been a recurring topic of debate and; it was apparent that there was a fresh need to review the union's resources to ensure that branches continued to have sufficient, stable and sustainable levels in spite of austerity measures imposed from outside.

Motion 126 was successfully carried and NDC instructed the NEC to conduct a two-year review of activity and expenditure at national, regional and branch level; to enable the prioritisation of union activity and expenditure, with a view to redirecting additional resource to branches. To facilitate this, the NDC created the Branch Resources Review Working Group. A body of 24 lay activists, 12 drawn from the NEC and 12 from each UNISON region. The group was instructed to oversee that the review reflected the union's agreed objectives based on sound financial governance and to ensure the highest levels of financial probity. Additionally, the motion set in place interim extra branch funding arrangements for the duration of the review.

The review groups intensive work has culminated in [Motion 72](#) and a [supporting report](#); the report is based on the results of a combination of good quality, independently verifiable data alongside a comprehensive engagement programme which consisted of listening to branch activists through a survey, interviews and regional meetings. The 14 recommendations are a package of measures that both increase support for branches and also identify areas in which the NEC can make savings to plough back towards branches. Significantly, the report proposed a new branch funding scheme which incorporates within it a new Branch Funding Formula and a new Branch Support and Organising Fund as the headline recommendation of the overall package.

The review period has now come to an end. The package of proposals meet the remit of Motion 126 and it has been endorsed by the Branch Resources Review group, the Finance and Resource

Management Committee and the National Executive Council. Motion 72 and the report 'Supporting Our Branches: Branch Resources Review' will be put to the Special Delegate Conference in June 2021.

Informing the Review

The Branch Resources Review group first looked at the union's key databases for information about how branches were faring, including the RMS, OLBA and the Organising Framework. In addition, all UNISON branches were invited to complete a Branch Resources survey in February 2020. The organisational data alongside the survey results offered the review group an opportunity to better understand what branches felt they required to best fulfil obligations to their members and further; the survey helped the review group members to see where branches wanted to focus and prioritise their work programmes.

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

The results of the survey 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 with growing difficulties and pressure building on senior branch officers and activists after a decade of austerity; not least dealing with a large 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:

- Focus on recruitment and retention of new members
- Education of members and activists; and
- 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):

- More time (including facility time)
- More support from regions; and
- More financial support

The review group has spent two years engaging with members, branches, regions, service groups, NEC Committees, self-organised groups and young members.

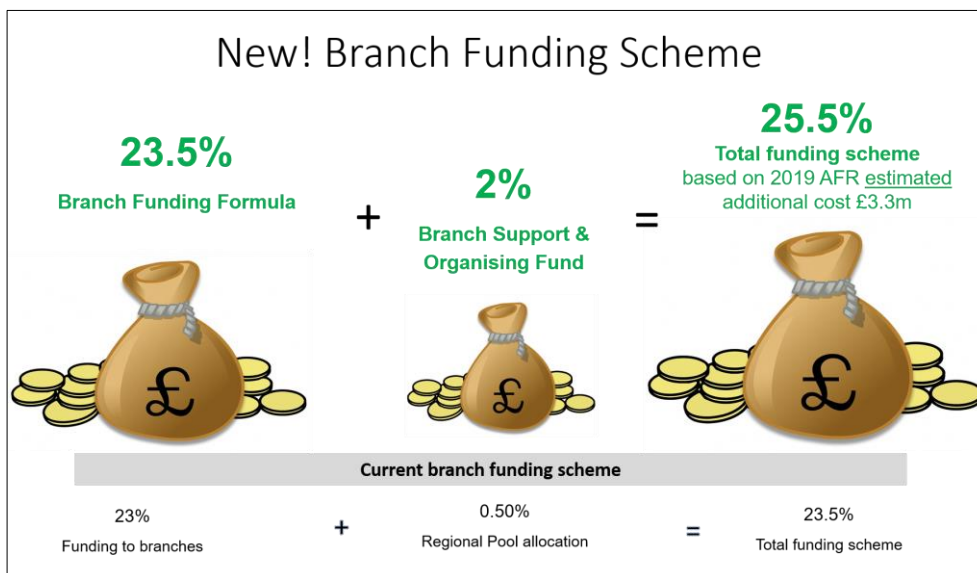
The proposals have been discussed and pored over at length at different Regional Council, Regional Committee and Service Group Executive meetings. Constructive sessions at the

Equality Liaison Committee with the chairs and vice chairs of the National Self Organised Group Committees and Young Members Forum heavily influenced the development of some proposals. Articles have been regularly published in the Activist Digital e-mail bulletin which have then appeared on the UNISON website. Regular posts on Twitter have also helped to engage activists in the process.

The Proposals

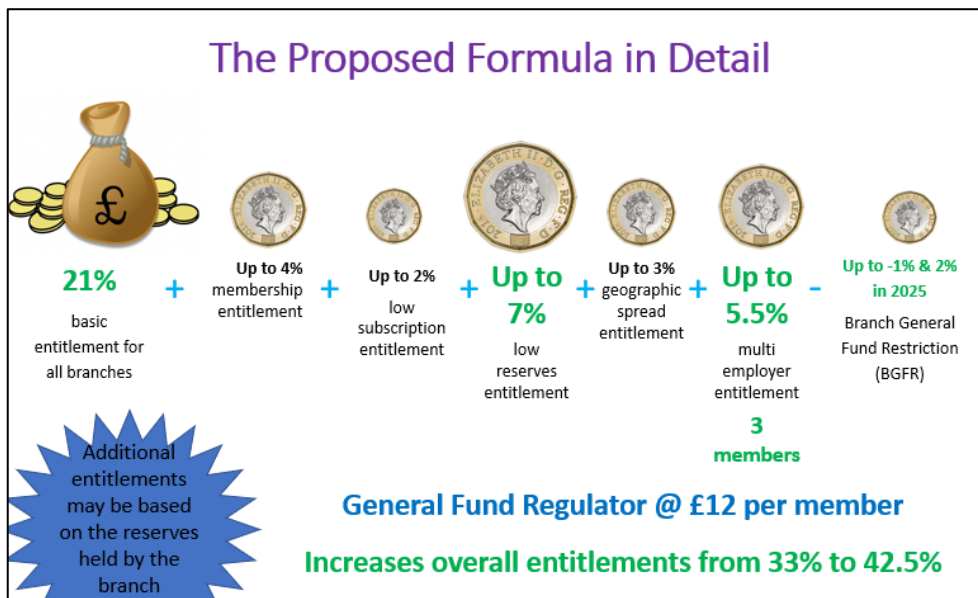
The BRR Review Group has put together a series of proposals which will provide more practical support for local branches including an improved branch funding formula and a new Branch Support and Organising Fund.

A new funding scheme for branches



1a. A New Branch Funding Formula

The last branch funding formula was designed in 2001. The new formula has been developed in response to the change of circumstances in which branches now operate. The proposal is to improve and redistribute the available money in a fairer way. The basic standard has been increased and extra entitlements for having members in multiple employers and low branch reserves have been included; moreover, the national standard for reserves per member has changed.



1b. A new Branch Support and Organising Fund

This new fund will replace the Regional Pool and the Fighting Fund. It will be four times the size of Regional Pool and will be managed under lay control. This fund will be easy to access, easy to manage, and will provide flexible support for branches. Activists will be able to use the fund to provide help with casework, with organising and/or for buying equipment. The Regional Pool and the Fighting Fund will no longer be available.

Recommendation:

Introduce a new and improved funding formula and scheme for branches 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. Subsidised Access to CaseWeb System

This provides one place for all casework, meeting also UNISON's environmental and GDPR commitments, and means branches and regions are using same system. CaseWeb was introduced following a motion to conference from branches and has already seen over 100 branches sign up to use it. CaseWeb will be available to branches at a 50% reduction for branches 2000 members or less.

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.

3. A National Procurement Offer to Branches

The Systems department at UNISON Centre will use economies of scale and expertise to achieve savings for branches by drawing up approved supplier lists that meet UNISON standards. This could include the procurement of IT equipment, office furniture and consumables on behalf of branches who chose to participate and would ensure suppliers met UNISON's ethical requirements such as the modern slavery code amongst others. Even if not using UNISON suppliers, branches could use national checklists.

Recommendation:

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

4. Online Meetings

Upholding and enhancing the union's democracy has been central to all the Reviews discussions. This proposal is that some national and regional meetings in the annual cycle after the pandemic could take place online or in a hybrid fashion with savings between £0.5m to £1m pa returned to benefit branches directly. The union's response to the impact of COVID-19, has shown us that we can operate using technology.

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.

5. Improved Conference Services and Revised Timetabling

The Review group is looking forward to the return of physical annual conferences after the pandemic. This proposal will 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.

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.

6. A union wide RMS Upgrade

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

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.

7. A Branch Service Portal

The Review heard repeatedly that branches need easy access to resources. As a response to this, an early prototype for the Branch Service Portal has already been developed which provides a gateway for branch officers to access information and tools that support their work and the engagement on this is ongoing. If the NEC endorses the package, this will be a site for activists under time pressure with content driven by activists' requests.

Recommendation:

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

8. Enhanced Bargaining Support

The proposal is to improve access and awareness of the existing bargaining support service of factsheets, guides, local pay claim and private company research to reach more activists. The current national Bargaining Support Group (two staff) based at UNISON Centre provide support for service groups, regions and branches.

Recommendation:

Deliver and promote an enhanced Bargaining Support Service to branches.

9. New Online Branch Expenses Module (inside OLBA)

Designed to make it easier to claim and pay expenses incurred by stewards and help treasurers.

Recommendation:

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

10. An update of the Code of Good Branch Practice

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.

11. Development of a Facility Time Strategy

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 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. This proposal will look to refresh this strategy and campaign and to see how we can help branches negotiate more facility time.

Recommendation:

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

12. Effective promotion of the Organising School events

A national organising school led by UNISON NEC and Regions to grow the number of skilled and experienced reps and stewards. UNISON has already had a leadership school on and off over the years which combined staff and lay activists working together. This would be the starting point for the new venture. The Assistant General Secretary for Organising and Recruitment confirms that a school would have taken place in 2020 but for COVID 19 and there are plans to hold them every two years with regional initiatives in the intervening years.

Recommendation:

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

13. Affiliations

Information to inform local decision making with a list provided of campaign group affiliations at national level to help branches.

Recommendation:

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

14. Implementation Group

If Motion 72 passes at conference in June 2021, there is a commitment to set up a lay led Implementation Group to ensure that all proposals in the package that make up Motion 72 are implemented efficiently and effectively.

Recommendation:

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

Conclusion

The Branch Resources Review has been a robust and thorough examination of all areas of the union. It is clear that UNISON is strong and powerful as a collective working together in branches, regions, self-organised groups, service groups, and the national centre. Activists throughout the United Kingdom have informed the work of the review at every step of the process. The review group has engaged with activists through surveys, meetings and presentations. Branches have been consulted about the issues facing them and this package of proposals contained within Motion 72 will provide support in different ways.

Motion 72 meets the remit of Motion 126. It is a fair, sustainable and affordable solution to the issues facing branches day to day. Motion 72 puts our union on a secure footing to face the future and it will enable every branch to be active and busy activists to save time and money as they support UNISON members.