

Special Delegate Conference 2021

Motion 72: Supporting our Branches

Carried as amended by 72.1

Conference notes that motion 126, which was passed at the 2019 National Delegate Conference, re-established a focussed two-year Branch Resources Review alongside agreeing interim branch funding formula changes. The aim was to conclude the review of branch funding which first started in 2011 with a report to conference this year.

Conference recognises the vital importance of well resourced and strong branches on the frontline, a feature of UNISON lay democracy since our creation in 1993 and unique in the UK trade union movement. Our branches are not abstract concepts in the rule book but made of stewards and officers who volunteer their time for the collective good. Strong active branches are the foundation of our union. Conference welcomes the National Executive Council focus on making the running of a branch easier, whatever the size, small or large, across all sectors.

The two year review outlined in the National Executive Council report to conference, Supporting our Branches, has been achieved despite the Covid 19 pandemic and the recommendations are as set out below.

The current branch funding formula was created by conference in 2001 and after nearly 20 years and a decade of austerity it is struggling to deliver equitably, not least in accounting for the increase in employer fragmentation hitting branches and overall union finances. Our branches are facing new and growing challenges and need innovative forms of support to continue to organise, recruit and deliver for UNISON members in the current economic environment. Strong branches need strong services with support from centre and regions working collaboratively.

That said, 2020 was not a typical year for our branches or our union due to the ongoing Covid 19 pandemic, so financial modelling for the review's proposals have therefore been based on 2019 and earlier years.

The review group was made up of 24 lay members. They considered branch, regional and national functions of the union as well as the existing branch funding formula and governance issues.

A survey of branches in early 2020 gave detailed feedback based on how the union was supporting branches to fulfil all of the core functions of a healthy branch, as outlined in the Code of Good Branch Practice. Branch officers emphasised they wanted to recruit and retain members, develop and train a new generation of activists and support members with representation. They

needed the union to help them with, in order of priority, more time (including facility time), more regional support and more funding.

The survey was followed up with in-depth interviews with branch officers across the country that gave a rich source of information about how our branch officers and stewards need the best modern support and systems. The review also engaged with regions, service group executives and self organised groups to further inform the review.

Conference recognises that the proposals in the National Executive Council report are built around a shift of resources towards branches by:

- 1) Improving support and services to branches,
- 2) An improved funding scheme that supports branches under financial pressure and recognises today's public service reality of fragmented employers;
- 3) The creation of a new Branch Support and Organising Fund to get additional and varied resources closer to branches and grow the union.

This approach and the comprehensive package include a series of measures that can be implemented in the short, medium and long term by the National Executive Council to help branches.

Conference welcomes the National Executive Council commitment to fully fund the report.

Conference therefore accepts the recommendations of the report and calls on the

National Executive Council to implement the following five points from the start of the next financial year (1 January 2022):

- a) 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%;
- b) Subsidise the monthly fees for the new CaseWeb system by 50% for branches who voluntarily subscribe to CaseWeb with 2,000 members or less;
- c) Establish a new procurement service to support branches in purchasing goods and services;
- d) 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;
- e) 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 as a first step towards the goal of an eventual reasonable adjustments shared pool for UNISON events and meetings at all levels of the union and a review of how decisions are made; and establish an appropriate lay member group to advise the NEC on other areas of reform.

Conference further calls on the National Executive Council to implement the following recommendations as soon as possible:

- i) 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;
- ii) Confirm and promote the Branch Service Portal as a web-based hub to help branch officers access key services and information;
- iii) Deliver and promote an enhanced Bargaining Support Service to branches;
- iv) Provide an online branch expenses module to help both activists and treasurers;
- v) 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;
- vi) Establish a new national facility time strategy and campaign to improve facility time for lay activists;
- vii) Confirm arrangements for regular Organising School events to develop and share lay activist skills;
- viii) Publish a list of all UNISON affiliations and supported campaigns to help branches and regions make informed decisions;
- ix) 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 National Executive Council 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) A standard percentage entitlement.
 - b) Additional percentage entitlements.
 - c) Additional funding drawn from a Branch Support and Organising Fund and managed at regional level.
 - d) 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 1st Jan 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.

