

Introduction

1. This document contains the procedures for electing our Service Group Executive (SGE). They are based on the UNISON rule book (as amended at the National Delegate conference in June 2023) and the current laws that apply to union elections. This procedure was approved by the National Executive Council's (NEC) Development and Organisation Committee of UNISON on 20 September 2023 and by the NEC on 25 October 2023. This procedure is designed to ensure that we meet the UNISON rule book's aim: "To seek to ensure that members, activists, representatives and staff are treated with dignity and respect at all times when participating in the union's democratic structures."

Appointing the returning officer and agreeing a timetable

2. At least three months before the election, the NEC will appoint an independent, qualified returning officer who will act as scrutineer under the Trade Union and Labour Relations (Consolidation) Act 1992. UNISON has entered into a three-year contract with Civica Election Services to carry out these duties.
3. The NEC will agree a timetable to include:
 - a. the period when nominations for elections must be received
 - b. the date when ballot papers will first be sent to members who are entitled to vote
 - c. the date by which members must return their filled-in ballot papers, and
 - d. the date the result of the election will be announced.

Timetable

4. The timetable for the election, as agreed with the Returning Officer, is set out in the election timetable (Appendix A). The period of office for successful candidates will be from the close of the National Delegate Conference on 21 June 2024 to the close of the National Delegate Conference in 2026.

Eligibility for candidates

5. Eligibility of members standing as candidates:
 - a. To be eligible for nomination to the SGE, a prospective candidate must have been a full member of UNISON for at least three months before the beginning of the date on which the election procedure is published.
 - b. Throughout the election process, prospective candidates must remain full members, and continue to meet the requirements of the seat for which they are standing.
 - c. The Returning Officer may rule on the eligibility of any prospective candidate at any time during the process.
6. Prospective candidates must be employed within and be a member of the relevant service group (e.g. Local Government, Health, Police and Justice, Higher Education, Water, Environment and Transport, Energy and Community) and recorded as such on UNISON's membership system. Prospective candidates may be required to produce three months of their payslips should any queries be raised in relation to their employment status.
7. Prospective candidates must belong to the region/constituency service group and appropriate category of the SGE they are seeking election to.

8. Prospective candidates must be nominated by at least one branch or regional self-organised group from within the region/constituency they are a member of. (See 39d)
9. At the start of the period of office, a low pay reserved seat holder (in line with Rule Q of the UNISON rule book) must be a female earning less than a basic hourly rate of £12.70 in their current post. (This amount is based on the median earnings defined by the Annual Survey of Hours and Earnings, in November 2023.) This rate excludes all supplements, e.g. London Weighting Allowance, London Living Wage supplement, recruitment supplements, overtime, etc. Proof will be required to ensure candidates' eligibility in this regard. This will be sought by the region who will contact the candidate directly.
10. Only members from specified categories, such as women's seats and low-pay reserved seats, can be nominated for those seats.
11. Prospective candidates can only stand as a candidate for one seat, which must be within their relevant region/constituency.
12. No member who holds a seat on the NEC as a service group representative can hold any other seat on the SGE at the same time. They may stand for election to the SGE, but if elected they will be deemed to have resigned from the NEC from the commencement of the period of office for the SGE seat they have been elected to.
13. Candidates must comply with all relevant GDPR and data protection legislation and guidance. All prospective candidates are advised to complete the mandatory UNISON Data Protection e-learning module found at <https://e-learning.unison.org.uk>

Service Group Executive constituencies

14. Any scheme for determining and electing/appointing representatives of sectors on service group executives, where appropriate, will be in accordance with Rule D.3.5.5.
15. Each service group is required to apply UNISON's commitment to promote proportionality and fair representation when determining constituencies and procedures for electing members to their Executive.
16. The constituency for election to a service group executive is based on the UNISON region to which that member belongs except where the NEC decide that a service group be organised on a different basis. In such cases the constituency will be based on the criteria decided upon by the NEC.
17. The actual constituencies for the various service groups are attached as Seat Guidance (Appendix B) to these procedures.

Election procedures, candidate and nomination forms

18. On the date set out in the timetable the election procedure and all relevant guidance will be:
 - Available to download from UNISON's website, and
 - Available from the Member Liaison Unit on request.

Submitting candidate applications

19. Submitting candidate applications and nominations:
 - a. All candidate applications, photographs and election addresses for this election must be made via the CES online portal at:
www.cesvotes.com/unisonSGE24
 - b. All nominations must be submitted via the CES online portal. Nominating bodies will receive an email with a unique link and codes to access the secure nomination website. This email will be sent to the email address listed in WARMS as the main point of contact for the branch or to the branch secretary's email as listed on the membership system.
20. A member is not treated as a prospective candidate until their candidate application has been submitted online via the CES online portal by the deadline set out on the timetable, and checks have been carried out to ensure they fulfil the eligibility criteria as laid out in paragraph 5 of this procedure.
21. If a candidate later wants to withdraw from the election, they must do so, in writing or by email, by the date set out in the timetable.
22. Candidate applications, election addresses and photographs must be submitted via the CES online portal. Email or paper copies cannot be accepted. For those encountering problems with the CES online portal or with access problems, please contact CES via email: Support-CESvotes@civica.co.uk or by phone to 020 8889 9203.
23. At the end of the nomination period, as laid out in the timetable, the Returning Officer will decide whether prospective candidates are eligible to stand in this election. If the prospective candidate is not eligible to stand, the candidate will be told why they are not eligible and have the opportunity to appeal.

Processing candidate applications

24. Only candidate applications received by the deadline set out in the timetable will be accepted.
 - a) An email will be sent to the candidate to tell them their candidate application has been received.
 - b) Candidate applications submitted via the CES online portal which are incomplete or incorrect may be referred back to the prospective candidate and the regional secretary.
 - c) The Member Liaison Unit will conduct eligibility checks to ensure that the prospective candidate is eligible to stand for the seat for which they have applied and they fulfil the eligibility criteria.
25. At the end of the nomination period, as laid out in the timetable, the Returning Officer will decide whether prospective candidates are eligible to stand in this election. If the prospective candidate is not eligible to stand, the candidate will be told why they are not eligible.
26. Candidates will receive an email no later than the date set out in the timetable, to confirm whether or not they are eligible to stand in the election.

Election addresses and photographs

27. All eligible candidates may submit:

- a. An election address
- b. A photograph.

These will be included in the ballot pack.

28. The election address should be no longer than 500 (five hundred) words in total. The 500 word limit does not include the list of nominating bodies, although the list will be included within the ballot pack. Any words over the limit will not be included in the election address.

29. Photographs must be a recent head and shoulders shot of the candidate, either black and white or colour. An electronic version of the photo must be uploaded via the CES online portal. The photograph must not contain the UNISON corporate identity or logo (or anything which in the opinion of the Returning Officer may be identified as such).

30. No photographs should be sent by email or post. No photographs will be returned. All photographs will be deleted/destroyed at the end of the election.

31. Candidates for seats elected by voters in Cymru/Wales may submit a Welsh version of their election address. The candidate may choose the primary language to which the 500 word limit will apply. The Welsh version must be provided by the candidate and must be an exact translation of the English text

32. In line with the Trade Union and Labour Relations (Consolidation) Act 1992, the contents of the election address, including spelling and grammar, are the candidate's responsibility. Neither the Returning Officer nor any UNISON employee will be allowed to correct or change any election address, except as necessary where the election address is longer than the word limit.

33. In line with UNISON's rulebook, election addresses should not contain statements that:

- go against our aims and objectives (as set out in Rule B)
- are discriminatory, racist, sexist or abusive or
- include false accusations against members or union staff.

Any election addresses that contain these kinds of statements will be treated as a disciplinary offence under UNISON's rule book.

34. UNISON will not be responsible for any civil or criminal liability arising from publishing, copying or distributing individual election addresses. This liability will rest with the individual candidate.

35. Election addresses must be submitted via the CES online portal no later than the deadline set out in the timetable.

36. For those encountering problems with the CES online portal or with access problems, please contact CES via email on: Support-CESvotes@civica.co.uk

37. Emails will be sent to candidates to confirm whether their election addresses and photographs were received.

Nomination meetings

38. Nominations can be made by branches and regional self-organised groups which fall within an appropriate region or constituency and service group. Nominating bodies may only nominate up to as many candidates as there are seats available in each of the relevant categories (appendix B). (See sections 8 and 39d).

39. The nominating process:

- a. Voting to decide which candidates to nominate must take place during the nomination period, as set out in the timetable.
- b. Once a nominating body has held a nominating meeting, they must fill in the online nomination submission, including the date of the meeting, the type of meeting, the number of people who attended, and the quorum (the minimum number of people needed to make that meeting valid).
- c. Nominating bodies can agree their nominations online in line with rule G3.3.2 of the UNISON rule book.
- d. Within a nominating body, only the members of the service group, region or regional self-organised group for which nominations are sought can take part in the nominating process including any voting to decide which candidates to nominate. Those nominations should then be confirmed at a quorate nominating meeting. (Eg only members who belong to the health service group can nominate a candidate for the Health SGE; only members in Local Government can nominate to the LG SGE etc). [NB Nominations may be invalidated if evidence is received demonstrating a breach of this rule.]
- e. Nominations will only be accepted if they are submitted via the CES online portal. They must be authorised by either the secretary or chair of the relevant nominating body via the declaration online. The names and UNISON membership numbers of the secretary or chair must be those recorded on the WARMS membership system for the branch secretary or branch chair.
- f. If the nomination submission has been authorised by another elected officer of the nominating body, an explanation of the reasons why should be given. Details of another elected officer of the nominating body – for example, a vice chairperson or assistant secretary – should be included, with an explanation of the need for the substitute(s).
- g. Where only one of these posts is filled, the authorisation of another branch officer is needed – i.e. two verifications are required.
- h. Nomination submissions must be filled in online via the CES online portal by the date set out on the timetable and nominating bodies will receive an automatic acknowledgement of receipt by email.
- i. A nomination helpline will be open on the dates set out in the timetable

Submitting nominations

40. Nominations must be received by the deadline. Then:
- a. An email will be sent to the nominating body to tell them that their nomination form has been received.
 - b. Nominations received by CES which are incomplete or incorrect will be referred back to the nominating body by the Member Liaison Unit as soon

as reasonably practicable with a copy to the prospective candidate and regional secretary.

41. At the end of the nomination period, the Returning Officer will decide if nominations are valid and whether candidates are eligible to contest this election. If the nominated candidate is not eligible to stand, the candidate will be told why they are not eligible.
42. Nominating bodies will receive an email no later than the date set out in the timetable, to inform if their nomination is invalid and stating the reason(s) for that decision.

Appeals

43. If a candidate or nominating body wants to appeal against the Returning Officer's decision, they should do so in writing by the date set out in the timetable. They must give full details of the reasons for their appeal and provide documents to support this.
44. Appeals should be sent to:
Phone: 0208 365 8909
Email: unison@cesvotes.com
45. The Returning Officer will make a final decision on appeals by no later than the date set out in the timetable.

Nomination helpline

46. UNISONdirect will run a nomination helpline during its opening hours as set out on the UNISON website, on the dates set out in the timetable, to provide information to nominating bodies and candidates.
Phone: 0800 0857 857.
Textphone: 0800 0 96 79 68.
47. UNISONdirect can confirm whether a nomination has been received. However, nominations should not be considered valid until written confirmation has been received from the Member Liaison Unit.

Notice of the election

48. Notice will be published on the UNISON website detailing how the ballot will be carried out, by the date set out in the timetable.

Entitlement to vote

49. All eligible members who are included on our membership system three months before the date set out in the timetable for voting to start will be entitled to vote.

Ballot paper and the method of voting

50. Ballot papers will be sent to the member's home address and online ballot codes will be emailed to the member's email address (or any other address they have given in writing) as shown on our membership system. Members will have the option to vote online or by post. The ballot pack will include a prepaid envelope for returning the ballot paper(s) to the scrutineer, and unique security identifiers for voting online.

Members who have not received ballot papers

51. Members who have not received a ballot paper by the start of the voting helpline should contact the UNISONdirect ballot helpline during its opening hours as set out on the UNISON website.

Phone: 0800 0857 857.

Textphone: 0800 0967 968.

Campaigning

52. UNISON recognises that campaigning, in whatever form, is a vital part of any election process. The following sections of this document include guidance for those branches and candidates who are involved in elections. The aim is to encourage members to participate in the election by campaigning in support of their favoured candidates, and to make sure that everyone is clearly aware of their responsibilities and the limits set to allow fair elections to take place.

Access to data

53. For the purposes of seeking nominations and later for campaigning during the election, eligible prospective candidates can ask the Member Liaison Unit for an electronic copy of the contact details for relevant nominating bodies. This will be provided free of charge and only become available from the date set out on the timetable. Data will not be issued until candidate eligibility checks have been completed.

54. These contact details will only be issued to prospective candidates.

55. These contact details may be used for the period of the campaign but must be destroyed immediately at the close of the ballot as set out in the timetable. If candidates use data to contact nominating bodies, this must be done in a way that complies with UK GDPR and data protection requirements at all times, as set out in the candidate data sharing agreement. Any unauthorised use of this data or failure to destroy this data may result in action being taken and may also breach data protection requirements.

56. Nominating bodies must not allow candidates, or their supporters, to have access to any membership data. This means that branch or workplace registers of members, including phone lists, email lists, home addresses, software for campaign activities such as MCT or other UNISON phone banking tools or any other contact details provided by or stored by UNISON or an employer must not be used for election purposes. Any unauthorised use may breach data protection requirements.

Campaign procedure for nominating bodies and candidates

57. Nominating bodies may make nominations through a regular meeting (eg branch committee meeting, an AGM or special general meeting). These meetings must be quorate.

58. Any nominating body that invites a candidate to speak at a meeting of the nominating body about their involvement in the election must also invite all the other candidates contesting the same seat(s). Candidates can appoint a representative to attend these meetings and speak on the candidate's behalf. It is

the responsibility of the prospective candidate to advise the nominating body of the name of their designated representative.

59. Nominating meetings must adhere to the principles agreed by the NEC including following Government health advice and not disadvantage any prospective candidates.
60. Prospective candidates or their representatives must not visit nominating bodies or workplaces to 'canvass' (persuade people to vote for them or against an opponent) without the nominating bodies' permission and unless the same opportunity has been offered to all other prospective candidates contesting the same seat. This does not prevent candidates or their representatives from campaigning in any area accessible to the general public (e.g. by distributing leaflets outside workplaces).
61. No nominee or candidate shall invite or accept any donation or contribution in money or kind from any provider of goods or services to UNISON or any employer in which UNISON organises.
62. Candidates may seek support (including donations) from other UNISON members. UNISON members may campaign in support of their preferred candidate(s) providing that they do not use UNISON resources to campaign.
63. UNISON funds, property or resources (as set out in section 63d) cannot be used to support campaigning for any particular candidate, except in the following circumstances.
 - a. Nominating bodies may tell their members about their nomination(s) through their usual methods of communication (for example, branch newsletters, websites and social media resources). A statement per candidate they have nominated or for a group of candidates they have nominated may be produced, it should only explain why the nominating body has nominated the candidate. It should not take the form of asking members to vote for the candidate. A photograph of the candidate who has been nominated may be included.
 - b. To hold meetings (as explained in these procedures).
 - c. To provide candidates with a copy of the contact details for all nominating bodies from the Member Liaison Unit (as explained in these procedures).
 - d. UNISON funds, property or resources' include (but are not limited to):
 - UNISON funds
 - UNISON facility time
 - Any resources as set out in the relevant employer's facilities agreement (including workplace email accounts).
 - The UNISON corporate identity or logo (or anything which in the opinion of the Returning Officer may be identified as such)
 - UNISON branch, regional or national secretarial, administrative and office facilities, including stationery, laptops and mobile phones
 - UNISON data, such as phone lists, email lists, home addresses or any other contact details provided by or stored by UNISON or as provided to UNISON by an employer. For the avoidance of doubt, UNISON data may not be used for communications from candidates (including incumbents) to members of branches during an election period.
 - UNISON publications, UNISON websites and UNISON social media, including branch and self organised groups (SOGs). For the avoidance

of doubt, images of, or references to candidates (including incumbents) must not be associated with encouragement to members to use their vote.

- The paid time of UNISON employees including branch employed staff expenses for travel and subsistence (food and drink), except for hustings.

64. UNISON national level or regional level committees which are not nominating bodies should not promote any candidates or use their social media resources to do so.

Number of candidates

65. If the number of eligible nominated candidates is no more than the number of seats for the constituency concerned, those candidate(s) will be considered to have been elected uncontested.

Voting system

66. The method of electing members will be by a simple majority of those voting in the election for each seat (or seats).

67. In the event of a tie, if the number of 'top-tied' candidates exceeds the number of seats then a further election will be run for those candidates who tied to determine who is elected to those seats.

Complaints about elections

68. If you want to make a complaint about the election you must write to the Returning Officer (by email to unison@CESvotes.com) by no later than the deadline set out in the election timetable. You should include any documents that support your complaint and state which paragraph(s) of the procedure you believe may have been breached.

69. The Returning Officer will decide whether a complaint is upheld.

70. Any complaint that is upheld by the Returning Officer may result in action being taken by UNISON, which may include disciplinary action under the UNISON rulebook and the Returning Officer has the right (if they consider it reasonable) to ask for all or part of the election to be held again.

The result of the election

71. The result of the election will be announced on the date set out in the timetable and published as soon as possible and notified to members through UNISON's normal methods no later than three months after receiving it.

Questions and contact information

72. If you would like any information or further explanation about these procedures or the election, you can contact the Member Liaison Unit using the details below.

Phone: 0207 121 5399

E-mail: elections@unison.co.uk

Appendix A - Timetable

18 December 2023

The election procedures are published on the UNISON website at www.unison.org.uk/elections.

8 January 2024

Nomination period opens
Nomination helpline opens
Prospective candidates may submit applications via CES online portal
Prospective candidates may request a list of nominating bodies
Prospective candidates may start to seek nominations from nominating bodies

9 Feb 2024

5pm - Nomination period closes.
Deadline for online nominating body submissions and prospective candidates' applications to be made via the CES online portal
Nomination helpline closes
Deadline for candidate photographs and election addresses to be submitted via CES online portal

1 March 2024

Deadline for nominating bodies and prospective candidates to be told about candidate applications and nominations that are not valid
Deadline for candidates to withdraw from the election

8 March 2024

5pm - Deadline for nominating bodies and prospective candidates to submit relevant appeals to the Returning Officer, where the Returning Officer has decided candidate applications and/or nominations are not valid

22 March 2024

Deadline for any appeal decisions by the returning officer.

15 April 2024

Voters are told details about the election (Notice of election)

22 April 2024

Voting starts.
Voting papers are sent to members.

1 May 2024

The start of the voting helpline for members.

10 May 2024

The end of the voting helpline for members.

17 May 2024

5pm - Voting ends.

24 May 2024

5pm - Deadline for written complaints and supporting evidence to be sent to the Returning Officer.

3 June 2024

Deadline for the returning officer to investigate and respond to complaints.

10 June 2024

The candidates are told the results.
The results are published.

Successful candidates will take office when the 2024 National Delegate Conference ends.
Their term of office will run until the close of the National Delegate Conference in 2026

Appendix B - Constituencies

Community Service Group

Region	General seat	Female seat	Low pay reserved seat
Eastern	1	1	-
East Midlands	1	1	-
Greater London	1	1	1
Northern	1	1	-
Northern Ireland	1	1	-
North West	1	1	1
Scotland	1	1	1
South East	1	1	-
South West	1	1	-
Cymru/Wales	1	1	-
West Midlands	1	1	-
Yorkshire & Humberside	1	1	-

Energy Service Group

Region	General seat	Female seat
Eastern	1	-
East Midlands	1	1
Greater London	1	-
Northern	1	-
Northern Ireland	-	-
North West	1	1
Scotland	1	1
South East	1	-
South West	1	-
Cymru/Wales	1	-
West Midlands	1	-
Yorkshire & Humberside	1	-

Health Care Service Group

Region	General seat	Female seat	Low pay reserved seat
Eastern	1	1	1
East Midlands	1	1	1
Greater London	1	1	1
Northern	1	1	1
Northern Ireland	1	1	1
North West	1	1	1
Scotland	1	1	1
South East	1	1	1
South West	1	1	1
Cymru/Wales	1	1	1
West Midlands	1	1	1
Yorkshire & Humberside	1	1	1

Higher Education Service Group

Region	General seat	Female seat	Low pay reserved seat
Eastern	1	1	-
East Midlands	1	1	-

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Greater London	1	1	1
Northern	1	1	1
Northern Ireland	1	1	-
North West	1	1	1
Scotland	1	1	1
South East	1	1	1
South West	1	1	-
Cymru/Wales	1	1	1
West Midlands	1	1	1
Yorkshire & Humberside	1	1	1

Local Government Service Group

Region	General seat	Female seat	Low pay reserved seat
Eastern	1	1	1
East Midlands	1	1	1
Greater London	1	1	1
Northern	1	1	1
Northern Ireland	1	-	1
North West	1	1	1
Scotland	1	1	1
South East	1	1	1
South West	1	1	1
Cymru/Wales	1	1	1
West Midlands	1	1	1
Yorkshire & Humberside	1	1	1

Police and Justice Service Group

Police Staff (by region)	General seat	Female seat
Eastern	1	1
East Midlands	1	1
Greater London	-	-
Northern	1	1
Northern Ireland	-	-
North West	1	1
Scotland	1	1
South East	1	1
South West	1	1
Cymru/Wales	1	1
West Midlands	1	1
Yorkshire & Humberside	1	1
National Sector	General seats	Female seats
Probation	2	3
Children and Family Court Advisory and Support Service (Cafcass)	1	1

Water, Environment and Transport Service Group

National Sector	General seats	Female seats	Male seats
Water Industry	3	3	3
Environment Agencies	3	2	2
Transport	3	1	1