**Branch Support and Organising Fund (BSOF) Operational Guidance**

**March 2022**

**Management of the BSOF**

The overall management and responsibility of the BSOF will be the remit of the NEC Finance & Resources Management Committee (FRMC). Additional specific operational reporting will be provided to the NEC Development and Organisation (D&O) on the nature of projects commissioned and Staffing Committees around any staff recruited via the BSOF as appropriate and within their remit.

The decision-making around project authorisation will be made by lay members on regional BSOF groups (RBSOF).

The Regional Secretary will act as Secretary to the lay BSOF group with responsibility for budget management and the implementation and configuration of any BSOF-funded staff.

The BSOF will operate within a unionwide national framework which will be supported by the Regional Management and Governance (RMG) function. They will ensure that the unionwide framework is being administered and applied consistently as per the Conference motion and Branch Resources Review Implementation Group. RMG will report on the operation of the BSOF to the FRMC and other NEC Committees as required to ensure lay oversight.

**What is the Branch Support and Organising Fund?**

It is a fund created to increase organising capacity, grow the union and support branches with activities and the pressures they face. All new ideas and innovation will be considered. The original branch resources review group received evidence from branches about the pressure on activist and branch officer time and the variety and sheer number of employers they were now faced with at a local level. The review group proposal, as accepted by Conference, was to create a fund that could help branches break from this cycle and in difficult and high demand local areas find ways to recruit stewards, secure facility time and start building collective power and agreements to improve pay and conditions.

**Who can apply?**

1. A branch (“Branch” projects)
2. A group of branches in a single region (“Multi-branch” projects)
3. A group of branches across multiple regions (“Cross-regional” projects)
4. Regional Committees/Regional SOG/Young or Retired Members (“Regional” projects)

**Note:**

**Self-Organised, Young Members, Retired members Groups**

Self-Organised, Young Members and Retired Groups will benefit from the BSOF by working with the region(s) to design project bids. The relevant self-organised groups, retired members or Young Members will be represented on the relevant project governing bodies. This will ensure that the projects can be effectively managed locally. It is envisaged that the projects will work with Branches.

**Cross Regional Projects**

Where cross regional projects are commissioned, a host region must be agreed upon in advance to lead the project.

**National Projects**

There is no provision for nationally initiated BSOF projects. Projects covering large national or cross-regional employer targets can be facilitated through co-ordination similar to cross regional projects. National projects will continue to be initiated and funded separately through the existing NEC and Service Group routes via the NEC Objectives.

**The Operation of the BSOF**

The operating of the BSOF is split into two distinct areas of responsibility.

1. **Local Project Commissioning**

This relates to the decision-making around the use of the regional BSOF budget and the commissioning and evaluation of regional projects. This is the remit of the constituted Regional Branch Support and Organising Fund group (RBSOF).

1. **BSOF Staffing Responsibilities**

This relates to the resourcing of BSOF projects including all matters relating to employment and management of staff funded from the BSOF and regional BSOF budget management responsibilities. This will be the responsibility of the Regional Secretary.

**What can be applied for?**

All BSOF initiatives should take the form of time limited BSOF projects. Projects can then apply to the BSOF Group for BSOF staff time in one of the following types:

1. **Organiser time** to assist with organising and recruitment activities
2. **Caseworker time** to assist with case work
3. **Equipment/materials/events** that strengthen branch organisation and/or recruitment

Agreed bids for time from the BSOF will then be referred to the Regional Secretary to determine the specific resourcing requirements and deployment. This is to ensure effective regional staff management and training and support can be accommodated to meet the project demands.

At the appropriate point there will need to be an equality impact assessment built into the process.

**Case Study 1: Single Branch based Organising project**

The fund offers the opportunity for a branch to address a particular local organising need and also possibly trial a role that they could later chose to deploy using their option to have Branch Employed Staff (BES). This could be to tackle a particular private or CVS employer and build membership and a steward network and ultimately seek a recognition agreement.

If agreed by the BSOF then the Branch would be allocated the relevant resources which could be a permanent/temporary/secondment BSOF staff. The staff selected would be then ring fenced to the project.

**Case Study 2: Joint Branch bid (single Region)**

One possible joint bid might be branches in a geographic area working together in different ways. For example, a group of small branches across different service groups in a town or city bid for a full-time staff member for a fixed period that they would share to address a case work or organising issue.

**Case Study 3: Multi branch schools project (several Regions)**

The Northern Education Trust (NET) in England crosses three Regions (Northern, North West and Yorkshire and Humberside) and is a large Academy School employer where there is UNISON membership but little activity. The branches with the NET Schools could work with the three Regions to design an organising project and BOSF bid to increase membership, stewards and collective bargaining. This could by three co-ordinated bids to three regional BSOF groups or one common super bid document used by all three. Either way the project board would need to be a three-region combined one to get the best out of the joint working and maximum impact to target these medium sized employers who cross more than one region.

**Case Study 4: Regional/SOG bid**

This option is for a cross region bid initiated by a regional committee, for example a SOG. This approach to an organising challenge/project will need to have a branch component and involvement. The bid form will ask if any branches committed to working in partnership with the Region and how branch organisation will potentially improve. More branches can be added later if the bid successful. For example, a bid to improve the diversity and number of health and safety reps across a Region would seek branches willing to participate with testing approaches, even if the overall plan is to produce benefits and materials that can be used across the whole region by the end.

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**Note:**

**Appropriate Use of Case Workers**

The immediate need for relief case worker capacity in certain areas is evident, especially since the pandemic. However, it is not the intention of the BSOF to build a dependency upon shorter term case workers. Plans outlining how to develop longer term case work capacity within the target branch must be included as part of the project bid – either through an activist identification and development plan and/or through the direct branch employment of case workers. Any future branch employed staff will be the sole responsibility of the branch.

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**Branch contributions and the short-term branch employed staff option**

The Branch Support and Organising Fund (BSOF) will fund organising activity and support for branches through NEC-employed staff (permanent, fixed term or secondment), but it is recognised that there will be situations whereby short-term BSOF funding can be utilised to pump-prime or pilot innovative ideas that involve branches directly employing staff or seconding staff from non-UNISON bodies, such as core employers. There are examples of the Regional Pool being used for this purpose, where benefits have been accrued, both for the branches submitting the bids and the union more widely.

Branches will be able to bid to the BSOF to provide short-term funding to assist with the employment/external secondment of Branch Employed Staff, provided the following conditions are met:

·                  The branch is able to meet the same organising and/or support criteria as other bids.

·                  The branch is able to present a clear exit strategy that means BSOF funding will only be required for a maximum of two years. It should be noted, similarly that where NEC employed staff are deployed to branches, this is not intended as a permanent arrangement.

·                   The branch is prepared to provide at least 50% match funding to support the Fund, where branches clearly have the reserves to do so. In cases where to offer match-funding would take the branch below the General Fund Reserve Regulator of £12 per member, the body receiving the bid should take this into account and adjust expectations of match funding accordingly.

·                  If the bid is received from a branch with low reserves, the regional BSOF body should understand how the branch intends to fund the activity beyond the two-year period. Of course, it may be that the bid is for an activity due to expire in two years or less, meaning that this consideration is not relevant.

Consideration can also be given to the potential for NEC-employed BSOF-funded staff to be seconded into the branch, especially if the criteria above are not met.

There is an expectation that branches will match NEC pay and conditions for BSOF funded fixed term posts in following circumstances: a) where a branch already has Branch Employed Staff that match NEC terms and conditions; and b) where this is the branch’s first ever member of staff.

Finally, branches need to be aware and avoid any equal pay or other risks associated with protected characteristics under the Equality Act.

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**What cannot be applied for?**

**BSOF cannot be used to fund financial commitments such as:**

* Long term directly employed permanent branch-employed staff (including branch administrative staff)
* Premises costs
* Digital services or licences
* Member or activist learning courses

**Application Process**

The application form must be signed off by the relevant Branch Secretaries, Treasurers and Regional Organisers to ensure all parties agree to the terms of the project. Applications will be considered by the Regional Branch Support and Organising group. There will be an Online application form.

**Appeals to Regional Committee**

It is envisioned that there should not be many appeals providing that submitting bodies complete the application process correctly and that BSOF are clear about their decision making and fairly distribute the limitations of the budget across competing demands. Any necessary appeals will be heard by the relevant Regional Committee.

**Note:**

Successful appeals cannot exceed the allocated regional budget.

**Regional Branch Support and Organising Fund group (RBSOF)**

Each Region will have a Regional Branch Support and Organising Fund group constituted on the following model:

* Regional Convenor (and Deputy Convenors)
* Regional Treasurer/ Chair of Finance
* Service Group chairs

The RBSOF Group is accountable to Regional Committee and Regional Council. SOGs will be engaged as appropriate on project development.

The quorum will be 33% of the BSOF Group membership.

The Chair of the BSOF will be the Regional Convenor and Secretary to the BSOF Group will be the Regional Secretary.

Proportionality and Fair Representation must be considered across the RBSOF membership.

Where a Region has an existing lay body, that is close to the above model then they can choose to use this, possibly with modifications to add or take away places. Before confirming this decision to vary from the RBSOF model they must test whether their existing group has a good spread of membership across service groups and meets proportionality and fair representation principles.

**Branch Support and Organising Fund Secretary Role**

The Regional Secretary will act as Secretary to the lay BSOF Committee with the regional budget holder responsibility and will ensure the effective management of staffing (including employment type) from the BSOF budget to meet the demands of successful BSOF bids. This model is intended to ensure accountability of budget and staff management whilst granting the maximum level of regional flexibility and autonomy.

**BSOF Staff Management**

BSOF staff will be on NEC contracts and all staff recruitment, selection, training and management will be provided by the region under the BSOF scheme framework, except for a smaller number of possible fixed term Branch Employed Staff.

All BSOF projects will need to maintain the BSOF project documentation framework.

All BSOF staff will be required to participate in the unionwide BSOF monitoring and evaluation scheme.

All secondments must be in discussed and agreed with HR at the earliest opportunity and prior to any job advertisement or appointment.

**BSOF Project Management**

Each project will have steering group made up of lay and staff stakeholders to inform the strategy development of the project and monitor project progress towards its objectives. This is distinct from the staff management which is the sole responsibility of the Regional Secretary.

All projects will be required to participate in the BSOF monitoring and evaluation scheme and each region via the Regional Secretary will be required to report project outcomes and progress to RMG who will then report these to the relevant NEC Committees.

**BSOF Regional Budget**

The Regional Budget will be issued to Regional Secretaries by the RMG function inDecember each year along with relevant cost code guidance.

Any unspent BSOF budget will be rolled over into the next year’s regional budget.

**Contributions to the Fund**

There is no requirement for match-funding of projects to the BSOF to be able to bid. However, we would strongly encourage branches to contribute financially where they have resources to do so. Branches contributing to projects enables the BSOF fund to reach more branches and projects each year. This process will be managed regionally by contributing bodies paying into the regional BSOF cost code. Any contributions must be paid at the earliest opportunity and in advance of any staff being allocated to projects.

**Review and Evaluation**

All matters with the BSOF will be kept under review and evaluation. Regions are encouraged to keep their Regional Council up to date with developments to encourage best practice and learning.