

GUIDANCE ON FUNDING BRANCH DELEGATES TO CONFERENCES AND EVENTS

This guidance is to assist branches to ensure a fair and consistent approach to meeting the cost of branch delegates attending UNISON conferences.

Branches are responsible for appointing and sending delegates to UNISON's national conferences - the annual National Delegate Conference, Service Group conferences, self-organised group conferences. Within the branch funding formula, provision is made to ensure that branches can participate in these conferences. Some of these conferences can involve overnight stays and normal living expenses for which delegates should be reimbursed on an equitable basis.

The responsibility for meeting the reasonable cost of delegations is met by the branch. These costs can be substantial and branches should:

- Plan and budget for delegations as a part of annual processes;
- Ensure a consistent approach to meeting the cost of delegates. Branches that are not consistent (for example in the level of expenses paid, or when they are paid, in hotel or travel arrangements) risk exposing the branch to claims of discriminatory treatment;
- Take into account the cost when determining the number of delegates to send to conferences

For information, the current rates paid to national representatives attending conferences are given at the end of this guidance. These rates can be used as a maximum level of payment by branches as they have been agreed with HMRC. Exceeding these rates may result in the delegate being liable to pay tax. Branches are reminded that this may impact on low paid members who are entitled to receive tax credits and may cause unintended poverty to some activists as well as deter low paid members from attending events.

Cost should not prevent a branch from being represented at the key UNISON conferences. Where financial difficulties might deter a branch from sending a delegation, application for assistance can be made to the union's Director of Finance at Head Office.

These notes of guidance are designed to assist branches to make the proper decisions about the payment of expenses to members attending conferences and other events on behalf of the branch. They should be reviewed in conjunction with the conference bulletins that outline any central arrangements for each conference.

Expenses and allowances – advance payment

Whilst the overall cost of delegations can be high for a branch, the burden for individuals meeting those costs can be even higher. Agreeing standard allowances (for example to meet the cost of meals taken away from home) and paying them in advance, instead of asking the delegate to claim back the actual cost later, can be helpful to the delegate and should be considered. Consideration should also be given to what expenses can be paid directly by the branch – for example, rail costs where these are not met centrally, and hotel accommodation.

Branches should only reimburse expenses on the basis of receipts that confirm the legitimate purpose for which the expense was incurred.

It is for branches to determine the level of expenses. The rates applied by the National Executive Council are attached as guidance and should be treated as a maximum level of payment.

Daily living expenses (meals and snacks, etc). If the branch chooses to reimburse delegates for meals on the basis of receipts provided, some reasonable limit should be set and made known to the delegate. Branches are, however, encouraged to agree a standard subsistence allowance. It is for the branch to determine the level of such allowances, and they should be applied consistently for all conferences and events. Subsistence allowances should reflect that a conference or event may be for a part day or a full day, or may involve overnight stays. They should also reflect that some or all meals may be provided. They should not normally be varied based on an assumption that eating costs may be higher in one place compared with another.

Travel costs For delegates, their children registered in the crèche, and any delegate's personal assistant, travel to and from National Delegate Conference, National Service Group and Self-organised Group conferences is met centrally on the basis of standard class rail fare to the nearest station, or air travel where appropriate. This is to avoid any branch being financially disadvantaged by the conference location. The cost of taxis, car parking or other incidental travel, if needed, falls on the branch.

The cost of travel for visitors is met by the branch, although provision can be made for central booking to enable visitors and delegates to travel together, and the branch invoiced accordingly.

Information about booking and the reimbursement of costs for these conferences is provided in the relevant conference bulletin. For other conferences, branches can assist delegates by arranging and paying for travel in advance using Stewart Corporate Travel:

48 Hamilton St
Saltcoats
Ayrshire KA21 5DS
Tel: 01294 602 893
Fax: 01294 605 246
Email: corporate@stewarttravel.co.uk

Accommodation For key UNISON conferences, guidance about booking accommodation is contained in the relevant conference bulletin. Where accommodation is not provided centrally, branches should plan well in advance as suitable accommodation can quickly be booked up especially where branches need accessible accommodation for disabled delegates and visitors.

Wherever possible, accommodation should be chosen in consultation with the delegate. The standard of accommodation will in part be determined by what the branch can afford, although a similar standard of accommodation should be chosen for all delegates attending all conferences. Branches should liaise with the delegate to ensure that accommodation meets the delegate's needs in respect of safety and security, accessibility and distance from the conference venue, en suite facilities and family rooms where appropriate.

The branch can take some simple steps to avoid common difficulties and inconvenience over pre-booked accommodation. Paying for accommodation in advance, or providing the delegate with a cheque made payable to the accommodation avoids the delegate having to first meet the cost of accommodation. Providing the delegate with a copy of the booking confirmation can avoid any dispute over reservations.

Dependent Care Costs A place in the crèche is provided free for children (up to the age of 16) of delegates and sharers. All other costs, excluding travel, fall on the individual member

or the branch. These may include the costs of accommodation or evening baby sitting so that a delegate can attend delegation or fringe meetings.

In addition, members who are normally carers for dependent relatives, etc, may be prevented from attending as branch delegates unless some alternative caring provision can be made for their dependent. It is for branches to determine to what extent they can and should assist with any of these costs, but whatever measures are taken should be applied consistently and with the aim of removing barriers from those members whose caring responsibilities may otherwise bar them from acting as a branch delegate.

Shared delegates The principle purpose of branches sending shared delegates to conferences is to encourage and provide support to new delegates. Whilst shared delegates may only have one vote, for the purpose of the payment of expenses, shared delegates should be treated as individuals and each provided with expenses on the same basis as a sole delegate.

Disabled members UNISON at all levels has a duty under the Disability Discrimination Act not to discriminate against disabled members, it also is required to make reasonable adjustments and this includes arrangements and facilities to attend the union's events. UNISON builds access into the infrastructure of its events for example by: contracting a venue that offers the best standard of access, providing accessible documentation, contracting sign language interpreting services (where need has been identified), the union also provides aids for mobility support such as scooters and wheelchairs. Some disabled members may need to be provided with access through support from a personal assistant and the cost of this provision will need to be taken into account through branch funding for fees and subsistence; subsistence rates should be on the same basis as the disabled delegate or visitor. NEC guidance on the use of personal assistance is currently being drafted by the National Disabled Members Committee and should be available to branches shortly.

For More information, see:

Code of Good Branch Practice

Organising For Equality

Conference Bulletins

Disability Discrimination Act Code of Practice on Trade Organisations and Qualifications Bodies - ISBN 0 11 7034185

Current national rates

NATIONAL EXPENSES FOR DELEGATES ATTENDING UNISON'S CONFERENCES 2007-8.

For your information the current rates paid by Unison nationally are set out below to suggest a suitable level of reimbursement:

Subsistence

Daily Subsistence paid where an overnight stay is involved and assuming the delegate will need to purchase all meals: £40.00 per person

Accommodation

Up to £75.00 per delegate per night. For any conferences that may occur within Greater London £90.00 per night is payable. In either case, where the market price for standard accommodation is above these rates, any additional cost must be supported by receipts.

Child/Dependant Care

Allowances for children and dependants attending conference:

For children up to 13 years old:

Daily Allowance if in a crèche: £15.00

Daily Allowance if no crèche is provided: £32.00

For children between 13 and 17 years old and adult dependants:

Daily Allowance: £40.00

Allowances for children and dependants not attending conference:

Up to £32.00 per child/dependant per day and £16.00 per night (the night allowance starts from 6.00pm) for the first child/dependant. For each additional child/dependant a further 20% of these figures (i.e. £6.40 daily and £3.20 nightly) is payable.

Travel costs

It is expected that branch delegates utilise public transport and/or any central arrangements that have been put in place by UNISON. The national mileage rate is currently 35p/mile (last set 1/1/05), and an extra 20% can be claimed if taking any passengers.