



Guidelines for  
Branches on  
**Applications  
to the  
Regional  
Pool**

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**UNISON**  
*North West*



## **REGIONAL POOL – INTRODUCTION**

The Regional Pool is an important source of funding for branches to help finance organising and recruitment projects. Many branches in the North West have benefitted from accessing the Regional Pool since it was set up in 2002. Some branches have used the money to fund promotional materials linked to a specific workplace campaign. Others have used it to help the branch co-fund initiatives that promote public services or encourage participation in union learning. The Pool has also been used to fund social events that help encourage recruitment and participation.

We want to encourage more branches to make use of the Regional Pool to fund a wide variety of appropriate (and perhaps innovative) projects in the workplaces you represent. It is important that branches pursue organising and recruitment activity and the Regional Pool is a resource to draw on to put ideas into practice. This guidance should help you put together an application to the Regional Pool, but If you have any queries please speak to the Regional Treasurer or your Regional Organiser.

This document is available on the UNISON North West website at [www.unisonnw.org.uk](http://www.unisonnw.org.uk), where it is labelled ‘Regional Guidelines’.

On our website, you can also find:

- Regional Pool Application Form
- Report Back Form – to complete after the Project
- National Guidelines

## EXPLANATORY NOTES



### 1 ALLOCATION CRITERIA

Each branch has a plan developed as part of the Branch Assessment Process. Bids to the Regional Pool should be consistent with this

plan. Regional Pool bids should also be aimed to achieve improvement in one or more of the following areas:

- ▶ **Recruitment / Retention**  
Recruitment of new members and/or retention of existing members.
- ▶ **Organisation of Stewards & Workplace Reps**  
Organisation of stewards, safety reps and/or workplace contacts, either by improving the coverage and numbers, and/or developing the skills and contribution of existing post-holders.
- ▶ **Member Participation**  
Member participation in the Union at branch, sub-branch or workplace level.
- ▶ **Effective Negotiation and Representation**  
Effective negotiation and representation at employer, departmental and workplace level, including membership involvement in the collective bargaining process.

## 2 USES OF REGIONAL POOL FUNDING

There is no limit to individual Branch claims which may be

- for purchases,
- to provide staff or to fund the release of activists for a defined organising project,
- for other costs necessary to meet the objectives of your proposal.

Where Regional Pool funds are used to pay for the time of someone to work on the project, it is strongly recommended that this takes the form of a secondment for an activist.

Where a branch intends to use Regional Pool funds to directly employ staff it is essential that they work exclusively on time-limited branch development projects and not on core branch administrative tasks. Any branch proposing to directly employ staff should seek advice from XpertHR to ensure that they comply with best practice and employment law.



In order to maximise the return on the union's investment, bids for Regional Pool funding should complement existing UNISON projects where possible.



### **3 APPROVAL PROCESS**

The Regional Pool Panel meets quarterly to consider applications. Applications will be approved, rejected, modified or referred back according to the allocation criteria and the Branch advised of the decision as soon as possible following a meeting of the Panel. Where the information provided by the branch is incomplete the application may be referred back to the branch prior to the scheduled Panel meeting. A report on the applications made and the decisions taken will be made to the Regional Committee.

Once agreement has been reached, funds are paid direct into branch accounts via the national finance department. There are sometimes exceptions to this. For example, where two or more branches have put in a joint bid or similar bids, the funds may be administered from the Regional Office.

If a branch has its application rejected it can appeal to the Branch Development Committee.

### **4 APPLICATION**

Branches should detail why they are making an application for additional funding from the Regional Pool and how it meets the allocation criteria outlined earlier in the document by completing the appropriate application form, which must be authorised and signed by each of the following:

- a) Branch Secretary
- b) Branch Chair
- c) Regional Organiser

The following information must accompany the application before consideration can be given:

***To be provided by the Branch***

- i) The current Action Plan from the Joint Branch / Regional Assessment
- ii) Copies of the branch accounts and the current year's budget



***To be provided by the Region***

- iii) Previous year's Annual Return
- iv) Details of the Branch's recent recruitment record



**5 REPORT BACK**

In order to monitor Regional Pool expenditure and to learn from the experiences of the various projects undertaken, one of the

conditions laid down in respect of providing additional finance is that branches provide the Regional Pool Panel a report and final evaluation on how the funding has assisted the Branch with the objectives set out in their application.

# CHECKLIST FOR REGIONAL POOL APPLICATION

Before you send in your application, ensure you have provided all the relevant information on the Checklist below:

\* Have Sections 1 – 7 on the application form been completed?

\* Has the Application been signed by the Branch Secretary, Branch Chairperson and Regional Organiser?

\* Is the Action Plan from the Joint Branch / Regional Assessment for this year attached to the Application?

\* Is the Branch's current year's budget attached to the Application?

Is any relevant back-up information attached to the Application?

\* Applications cannot be considered without this information