SPECIAL REDESIGN CONFERENCE
DELIVERING A CONNECTED UNION THAT EXCELS
IN AND OUT OF THE WORKPLACE
Dear Colleague

We are now in the next phase of the Redesign Project and the NEC are pleased to publish to Branches a series of policy papers which will be debated and voted on at the Special General Conference on the 3rd and 4th November 2018.

The policy papers are the culmination of an extensive and inclusive process, including a major consultation with Branches, lots of detailed meetings with the NEC, National Briefings and General Conference motions and debates.

The NEC believe the implementation of these policy papers support the objectives of Redesign as determined by Annual Conference and will enable us to build a connected organisation that can excel in and outside of the workplace as we prepare to face the future.

In considering these policy papers Branches should take account of the following which are also integral to the overall Redesign Project and the consistent thinking that underpins it.

The Reorganisation of CWU Headquarters

This work is progressing well and the successful outcome of the reorganisation of our Headquarters is fundamental to our ability to remain as a stand-alone union. We are focused on reducing the duplication of energy, resources, roles and responsibilities and introducing an affordable structure that will operate in a more joined up way.

The Review of our Assets

The Asset Review is also crucial to the future of the union and our ability to fund necessary investments, including IT infrastructure, communications, a new reps package and more ambitious Organising and Recruitment Initiatives. All options are being considered, including whether there are opportunities to generate additional income from our existing assets. However, whilst no final decisions have been taken, we are clear that the most likely outcome will be the relocation of CWU Headquarters to a smaller site, the sale of Alvescot Lodge and the Elstead Hotel (pending the outcome of plans to turn that business around).

The Overall Financial Considerations of the Redesign Project

For all the well documented reasons that Branches are fully aware of, achieving financial stability is a key objective of the Redesign Project. However, we also want to make it clear that this does not mean that we are looking to reduce expenditure in every single area – this would just amount to managing the decline of our organisation. We are taking a holistic and balanced approach between savings and the investment necessary to deliver an agenda that will make a real difference to the lives of our members, their families and workers everywhere.
Next Steps

Further reports will be published in the near future that will explain and expand on the overall financial considerations of the Redesign Project and update Branches on the reorganisation of CWU Headquarters and the Asset Review.

We will also commence a comprehensive communications programme that will enable Branches to raise any questions on the policy papers and engage in a constructive two-way process on their content. Details of this will be published later this week.

Between now and the November Conference we will take forward other areas of work that are essential to the overall Redesign Project, including:

• Developing and Investing in a New Support Package for all CWU Reps

This is about enhancing training and development opportunities and offering access to support mechanisms for all CWU representatives dealing with the realities of today’s much harsher work environment. The principle we are committed to is that some of the savings made elsewhere within Redesign can be reinvested into frontline representatives. Going forward we want to be clear that if you are a representative of the CWU this is the package of support you will receive and this is what we expect in return.

• Developing a Successful and more Ambitious Recruitment and Organising Strategy

This is vital to our future and it’s time for us all to recognise that if we harness our strengths as one union, then we can achieve a lot more in recruiting and organising in our existing sectors and beyond.

This is not just about wanting to secure our future, it’s also about creating the race to the top for all workers and challenging the balance of forces that exist in the world of work. We want to be in a position by the November Conference where we can demonstrate that we have developed new initiatives and report and engage with Branches on a fresh approach.

• Unionline

We are in the process of finalising the review of Unionline and this is another major piece of work of which the outcome will be reported to Branches prior to the Special Conference. The importance of Unionline to both our overall financial position and the range of Legal Services we can provide to members cannot be underestimated.

Summary

In the last few years we have set a clear direction for the union and are delivering the agenda set out in the General Secretary’s election, including:

• Continuing to put the protection and enhancement of our members’ terms and conditions at the heart of everything we do.

• Developing strategies to reassert trade union values across society and shape the future world of work.

• Supporting the need for major political change and playing a significant role in achieving this.

• Building a stronger one-union identity.

• Providing a greater focus on communicating and engaging with representatives and members.

• Facing up to the financial issues that threaten our future.

Alongside the reorganisation of Headquarters, the Asset Review and the ongoing work projects listed, the NEC policy papers represent the next steps in delivering the above agenda and means we can face the future in the firm belief that we are building a connected union where the sum of the whole is stronger than the sum of its parts – in the interests of all our members.

Dave Ward
General Secretary

Tony Kearns
Senior Deputy General Secretary
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1. Introduction

This policy paper provides a summary of the key findings from the Redesign National Consultation on Branches and sets out our proposals for Branches that will be debated and voted on at the Special Redesign Conference on the 3rd and 4th November 2018.

2. Summary of the Key Findings from the Redesign National Consultation on Branches

The following covers the main points from the many similar and diverse views that came from Branches in the National Consultation.

There were a total of 620 different responses to the 6 questions set out in the Branches section of the Consultation document.

2.1 Branch Structure

Although the initial purely numerical findings are inconclusive in terms of any great support for a major overhaul of our Branch structures, the more detailed responses provided a real insight into the things that Branches would wish to see put in place to support and improve Branch performance. There was a view from many Branches that several aspects of our Branches should be reviewed from clearer roles and responsibilities to better guidance on mergers. There was a very clear view across many Branches that the current structure although not ideal in all cases is working reasonably well. Many responses emphasised the need for Branches to maintain strong links with our workplace organisation. Some Branches took the view that we should no longer have smaller Branches of less than 500 unless they were offshore, single employer or significantly remote geographically. However, there was little support though for a programme of forced Branch mergers, rather for reviewing, encouraging and supporting Branches to merge if a Branch is no longer viable. Many Branches felt that there is no “one size fits all” when it comes to our Branch Structure, but that there should be common standards that all Branches can achieve.

2.2 The Fourteen Measures of Success for Branches

There was strong and broad support for the fourteen common measures of success for Branches that were published in the consultation document. A large majority of Branches saw these measures as a helpful way to develop the Branch, improve performance and support the Branch Officers. It was stressed in a number of responses that Branches should be supported and trained to reach these standards and there should be a formal health check to help Branches reach and maintain the standards.

2.3 Branch Finances

Although a number of Branches were silent on this issue and others were supportive of retaining the status quo in terms of the Branch Rebate, many of the responses received demonstrated a very clear understanding of the real difficulties faced by Branches who are disadvantaged by geography and were generally supportive of measures to combat this and many Branches felt that it was time for us to review the current arrangements.

A good number of responses were supportive of some if not all of the options included in the consultation document including a basic level of funding. A number of Branches highlighted the withheld rebate as no longer being fit for purpose and made various suggestions for how this could be redistributed more equitably. Many Branches regarded the very significant sums being held in bank accounts or the withheld rebate as problematic – in fact there was no obvious support for this approach to Branch finances. There was strong support for Branches to be able to apply for additional funding if they were using this for recruitment and organising, and there was also some support for applying a cap on what monies can be carried over year on year by Branches. Several Branches emphasised the need for a viable financial or development plan to be produced to ensure that activity and expenditure is well managed and planned. In summary, there was support for change but no real consensus on precisely what that change should look like.

2.4 Branch Premises

As can be seen from the responses provided, there was no great appetite from Branches to change the current arrangements, by which some Branches purchase, some lease and some use employer facilities. It is important however that the NEC ascertain and audit precisely what we have at present in terms of leased and owned property.
2.5 Pooled or Shared Resources

There was a positive response to the question on whether Branches should pool or share resources such as office space, training rooms or printing facilities with 62% of Branches considering this something that should be encouraged. This is clearly something that could realise savings for Branches and produce economies of scale and more efficient use of resources.

2.6 Centralised Purchasing

Of the Branches that responded 75% were broadly supportive of moving to a centralised purchasing of some resources and systems such as telephones, broadband, software and hardware. However, Branches were also very clear that they would wish to see real savings to current costs and HQ would have to negotiate a better deal than what Branches could achieve locally.

2.7 Centralised Case Handling System

Over 80% of Branches were supportive of the introduction of a single online system for storing data relating to casework and could see the benefits particularly in light of the requirements of GDPR.

3. Proposals for Change - Branches

The Redesign proposals/recommendations for Branches are focused mainly in two areas.

Firstly, the need to improve consistency and standards on what we expect from Branches in carrying out union work and representing our members. This is mostly centred on the fourteen measures of success which appeared in the original consultation booklet and are now published again for ease of reference in Appendix B.

Secondly, the need for the whole of the CWU to now work together and achieve financial stability.

The financial aspects of our proposals for Branches are centred on making 3 changes that are separate in their implementation but are linked in that together they constitute a new approach to Branch funding.

The first aspect is the trial and then implementation of a new Branch funding formula (rebate). The second change is the new rules about the use of the Withheld Fund. The third change is the utilisation of 50% of all monies currently held in Branch accounts being placed in the Withheld Fund, to be used as set out in Recommendation 9 of this policy paper.

The financial aspects of this Redesign paper are both unavoidable and essential to the future development of the union and we will soon be providing Branches with a separate and detailed explanation on these proposals. This report will provide the necessary clarity on the proposed changes, what they are intended to achieve and how they link together. Suffice to say, the reality is we are making major changes to CWU Headquarters in the interests of the whole union and it's now time for Branches to make their contribution for the same reason.

Finally, the NEC has considered whether or not this is the right time to conduct a major review on the overall CWU Branch structure. However, we have concluded that the priority should be to raise consistency and standards and that this would be the wrong time to launch a wider review.

Nevertheless, given ongoing membership trends, our desire to operate more effectively as one union and our ambition to grow beyond existing parameters, a full review will be necessary in the near future.
1. That the NEC produces clear role descriptions for the principal officers of CWU Branches and that the roles are appended to the Model Branch Constitution.

This should include Branch Secretary, Branch Chair and Branch Treasurer.

2. That a training plan be put in place for new principal officers of Branches that will be completed within the first year of office. The aim will be to complete this within 6 months.

3. That the NEC review Branches that have less than 500 members to ensure that they are able to fulfil their obligations under Rule and that unless there are compelling geographical, industrial or organisational reasons for that Branch to remain stand-alone, merger should be encouraged and supported.

4. That the union adopt the fourteen measures of success for Branches as an appendix to the Model Branch Constitution.

5. That the fourteen measures form the basis of a biennial Branch “mandatory health check” to normally be carried out by the relevant Regional Secretary under the auspices and with the full authority of the General Secretary, with the aim being to support, encourage and develop Branches and Branch Officers through this process.

6. That the NEC introduce a transparent system whereby any Branch that fails to participate in the “mandatory health check” and to work in accordance with the rules and towards achieving the fourteen measures may be subject to some form of sanction including but not limited to a financial sanction.

7. That a new Branch funding formula (rebate) is introduced that provides a minimum level of funding to all Branches. This shall not exceed an average of the previous 3 years actual expenditure, expressed as a percentage of actual income received and would be allocated subject to receipt of a completed financial plan in accordance with NEC guidance.

This new Branch funding system will be trialled from the beginning of 2019 amongst a number of Branches who will be determined following discussion with the SDGS Department. The results of the trial will be assessed after one calendar year and a report to Branches outlining the way forward will be made following that trial.

8. To ensure there are sufficient funds available to fund a new approach for the use of the Withheld Fund monies, (as laid out below), 50% of all monies currently held in Branch bank accounts will be placed into the Withheld Fund.

9. That from May 2019 the current monies held in the withheld rebate account be utilised in line with the following formula:

• 25% will be available as a fund for Branches to bid for to support local organising and recruitment activity.

• 20% will be available to provide assistance for those Branches whose geographical size or remote location causes funding difficulties. Allocations would be subject to the production of an itemised and costed budget in line with the authority of the NEC as detailed below.

• 30% will be available to support centralised and strategic Organising and Recruitment campaigns.

• 25% will be held in reserve by the NEC as an Emergency Fund.

- Monies from this fund will only be released upon application to and only by decision of the NEC and subject to strict criteria.

- Monies released to Branches for assistance will need to be supported by a clear financial plan supporting the bid.

- Monies released to Branches for Recruitment and Organising activity will only be released by decision of the NEC and only for campaigns that form part of the overall strategies of the CWU in this area, again such requests will need to be supported by a clear financial plan supporting the bid.

10. CWU HQ will ensure that specific training and support for Branches will be provided so that Branches are able to meet their financial planning requirements and also to ensure the ongoing successful financial management of a Branch once such a plan is in place.
Branch Premises

11. That a review of premises be carried out by the NEC in 2019 in line with the option set out on page 18 of the consultation document and included as Appendix C.

Pooled or Shared Resources

12. That the Finance Department should work with the relevant Regional Secretary and Branches to carry out an audit and identify how and where any resources or premises could be shared to reduce costs. This would include meeting and training rooms and facilities, printing and duplication facilities, video conferencing facilities and other facilities or resources that could potentially be shared and produce savings. Branches would then be encouraged but not compelled to consider sharing resources and facilities as appropriate.

Centralised Purchasing

13. That we work with Branches to establish current contracts for telephone, mobile and broadband with the aim of a trial of a central purchasing scheme for Branches who wish to opt in.

Additionally, we carry out an audit of IT and office equipment with a view to costing a central purchasing system for IT hardware and software and office equipment from January 2020 for those Branches who wish to opt in to such a scheme.

14. That we publish a further report and recommendations concerning any expansion and roll out of the scheme at the end of 2020.

Centralised Case Handling System

15. In light of the GDPR work that has already commenced under the direction of the SDGS on identifying potential systems to handle case work and data storage at Branch level, a further report will be made on this to the NEC and subsequently Branches.

APPENDIX B – THE 14 MEASURES OF SUCCESS PUBLISHED IN THE ORIGINAL CONSULTATION BOOKLET

Below we set out the ways we will evaluate how effective our Branches are. These measures are a mixture of qualitative and quantitative data. How we monitor progress will be key in delivering consistent good practice across the CWU.

1. Membership increase and decline and membership trends with explanations for any major changes – do they regularly update and analyse membership data, do they map workplaces and groups of members, do they regularly carry out comparisons with employer data?

2. Participation in union structures and activities e.g. Conference, Region, IR, Equality structures, and union education and training – does the Branch submit motions to conferences? Do the Branch nominate for key elected positions above Branch. Do Branch candidates stand for election for Regional and National positions, delegations etc. What is their voter turnout in elections and ballots?

3. Recruitment – do they systematically recruit non-members and plan for recruitment activity in core and non-core workplaces as a regular and ongoing part of their work?

4. Participation in Political and campaigning activity – how many CLPs and Trade Councils are they affiliated to? How many active Labour and Momentum activists do they have? What other local and community campaigning activity do they undertake?

5. Proportionality – are the Branch reps proportionate to their membership in terms of women, BAME, Young Workers etc. Are delegations representative? Are meetings and events inclusive?

6. Activism – number of reps and activists in the Branch and lack of vacancies for positions, regular workplace visits and activity, workplace campaigns. Attendance at meetings and events.

7. Succession planning – do they actively recruit, train and support new reps? Is there evidence that new reps are retained and progressed through the structure? Do they encourage new activists to get involved in wider union activities?
8. Planning – do they actively plan their activities and objectives on an annual basis? Do they regularly review and evaluate their plans?

9. Financial Management – do they have a clear and detailed budget that they work to? Do they produce a financial plan? Do they have transparent and clear policies for finances? Do they spend their rebate?


11. Case work – do they have a system for ensuring consistent approaches to managing case work.

12. Do they have adequate administrative systems, hardware, software and connectivity to ensure the smooth running of the Branch – do they follow good practice in terms of management of their data?

13. Do they use a variety of methods of communications to get their message out and to keep members informed? Do they use social media, have a magazine, use video, blogs, group emails, newsletters, posters etc? Do they have noticeboards in all workplaces? Do they use radio or other advertising to get the CWU message across? Do they produce their own leaflets etc.?

14. Do all the key Branch positions have the right skills and training to do their job effectively? Does the Branch have an annual training plan and budget?

- Duplication of facilities in some Regions
- Lack of facilities in some Regions
- Where Branches could share resources and facilities
- What we require as a minimum
- How we maintain, develop and support these venues in terms of legal obligations to members, activists and employees.
- How we ensure that purchasing and leasing of any property in the future should be part of a more strategic approach to our assets and resources.
- Whether we need to consider any changes to existing premises and facilities and how we can work with Branches to achieve this.

APPENDIX D BRANCH FINANCES – NEW BRANCH FUNDING FORMULA

Recommendation 7 sets out a new formula for calculating Branch rebate that “shall not exceed an average of the previous 3 years actual expenditure, expressed as a percentage of actual income received.”

In order to enable understanding of how this would work the following information is provided to Branches.


Total Branch expenditure as a percentage of total income for the period 2105-2017 inclusive was 28.8%. So Branch rebate based on actual expenditure would be 28.8%

By way of explanation, if the above approach had been in place for 2017 (the last set of consolidated accounts) the amount paid out in Branch rebate would have been £108,197 less, this works out at an average reduction in Branch rebate of £838.73p per Branch for the full year.

Note - Cash held at Branches year end 2017 £5,592,072
1. Introduction

This policy paper provides a summary of the key findings from the Redesign National Consultation on Regions and sets out our proposals for a changed and more relevant Regional structure that will be debated and voted on at the Special Redesign Conference on the 3rd and 4th November 2018.

2. Summary of the Key Findings from the Redesign National Consultation on Regions

The following covers the main points from the many similar and diverse views that came from Branches in the National Consultation.

There were a total of 754 different responses to the 9 questions set out in the Regions Section of the Consultation document.

2.1 Support for Regional Structure

Although 59% of Branches are supportive of the existing Regional Structure, this support is by no means uncritical. Many Branches were supportive of the structure as a place where we organise and act as one union, where we are politically effective and as a link between Headquarters and Branches. However, there was criticism of the structure in terms of holding too many unproductive or boring meetings and there was markedly less support for the structure among Branches in the T&FS constituency. So, in summary the concept of the structure was broadly supported, however there was a real recognition that it has to become more relevant and more inclusive, so that all Branches from all parts of the union buy in and feel greater ownership of it. Branches were also keen to see a more accurately defined role and clearer objectives set out for the Regions. There was little enthusiasm for making major changes to the structure in terms of decreasing the number of Regions.

2.2 The Purpose of the Regions

There was broad consensus from Branches that the Regions should focus on:

- Political Campaigning.
- Supporting and assisting Branches and their activists.
- Organising in non-recognised target companies.
- Being a link between Headquarters and Branches.
- Representing the union on Regional issues.

Although there was recognition of the good work already done in the Regions, there was a definite demand for a more clearly focussed and a more broadly understood role for the Regions with clearer objectives.

2.3 The Role of the Regional Secretary

There was broad support for a clearer and more consistent role description for a Regional Secretary and greater clarity required on the roles of Regional Assistant Secretary and Chair, all of which should be designed around the Regional objectives and priorities. There was a very clear preference from Branches for the role to remain elected and strong opposition to it becoming an appointed role. However, there was some support for increasing the term of office for Regional Secretaries for reasons of consistency, development and security.

2.4 Regional Sub-Committee Structure

There was praise for Regional Sub-Committees in Regions where they are well supported, well established and very active. But there was a recognition also that they are not consistently active in all Regions for a variety of different reasons. Too often Branches view them as little more than talking shops. Therefore, there is considerable support from Branches for reviewing and re-organising these structures. There was a fear that minority voices may not be heard or may lose access to important support networks with any change to these structures.

2.5 How many meetings and what sort of meetings?

Branches clearly want Regional meetings to be more relevant, productive and useful. They also want all Branches in a given Region to be represented at these meetings. The so called “North West” model of having a Regional Conference as part of the AGM was widely supported and has already been adopted in the Midlands and the London Regions.

2.6 Links to the NEC

Branches clearly want improved lines of reporting between the NEC and the Regions and expressed a strong view that this reporting and accountability
should be a two-way process. The work and activities carried out at NEC level should be mirrored in the Regions. The agenda should be a common agenda covering the same issues and National and Regional objectives should be complementary and mutually supportive.

2.7 Funding for the Regions
Branches recognised that at present the funding for Regions is not necessarily adequate or equitable. Some Regional Sub-Committees have their own funds under Rule and some do not. Some Sub-Committees make good use of funds and others have funds accumulating for years in the bank with little activity attached to them.

Regional expenditure should be strongly linked to Regional Development Plans and the Region should determine how expenditure is prioritised in accordance with CWU Policy and Rules.

2.8 The Principle of Consensus in the Regions
There were a variety of different views and concerns raised by Branches on the issue of decision-making by consensus. There was some support for retaining the consensus model, some support for an ordinary majority system and quite a lot of concern also about allowing an effective veto to remain in place. It is also clear from responses that this model operates without problems in some Regions and causes problems in others. It was set up at the time of merger with the reasonable and noble intention to ensure that one constituency could not completely dominate. However, twenty three years on it’s time to review this process.

2.9 Branch Biennial Health Checks
The principle of Branch health checks based on the fourteen measures of success in the Branch consultation document has attracted strong support from Branches and the NEC. Branches sought reassurances that the process would be supportive, open and transparent.

3. The Case for Change

3.1 There is a consensus across the union that our current Regional structure is not nearly as effective as it could or should be.

The CWU approach to Regions lacks consistency, clarity of purpose and is often disjointed with a multitude of meetings and no clear plan on how all these fit together. In some ways this is a by-product of how the union has evolved whereby parallel structures or new areas of work have been introduced with little thought as to how these relate to each other and other parts of our organisation.

3.2 Since the CWU came into being in 1995 there has never been full buy-in to our Regional structure. This has happened through a combination of constituency concerns, inconsistency and a belief amongst some representatives that non-industrial work is not an important part of a trade union.

Regions have mostly been seen as the domain of Postal Branches, although even within the Postal constituency they are often viewed as just a necessary add-on.

The constituency imbalance in the number of Regional Secretaries has been unhelpful, although there are other reasons Branches have not bought in and this to some extent has perpetuated that imbalance.

However, as part of Redesign, it’s time to recognise that with a fresh approach Regions must now become the place where the whole union comes together – in the interests of all our members – to build a stronger “one union approach” to our non-industrial work.

3.3 The CWU is a strong industrial union and continuing to protect and enhance our members’ terms and conditions will always be at the heart of everything we do. But what is becoming clearer is that, in the future, for us to be able to continue to operate effectively at an industrial level, we will increasingly need to play a greater role in wider trade union and labour movement struggles. A more relevant Regional structure is crucial to this.

3.4 In the last few years the CWU has grown its profile and influence within the TUC and Labour Party. We have developed a progressive and ambitious agenda and set a clear direction – leading the call to mobilise the movement in the fight for a new deal for workers and playing a significant role to bring about change in Labour.

To take our agenda to the next level it is essential we build a stronger, more vibrant and connected Regional structure, which through a rejuvenated work programme can deservedly command support throughout the union.
4. Proposals for Change

4.1 A More Relevant Regional Structure

The NEC believe a reinvigorated Regional structure is fundamental to delivering a sustainable, connected and “whole union” strategy for the CWU going forward. The Regions are where we gather, organise and act as one union and where we see huge potential for joining up our work on politics, campaigns, organising and non-industrial work. The structure must be inclusive and diverse and therefore we will continue with the current Rule that provides that at least one of the three principal Regional Officers will be a woman.

The CWU has developed strategies to reassert trade union values in society and achieve major political change. However, we are clear that to deliver this agenda it is essential that we now build a more relevant and connected Regional structure. This means connecting structures to increasingly utilise collective strength for the benefit of all and breaking down silo working to reduce duplication of effort, energy and resources.

To appreciate how a new Regional structure would operate we must first see it in conjunction with the reorganisation of CWU HQ. Going forward Headquarters will be based on a three-pillar approach. The foundation of this is a Central Policy and Services pillar supported by two industrial wings and vice versa.

The new Headquarters Policy and Central Services pillar will bring together all non-industrial work in a more effective way to strengthen the way our central services support the needs of the Industrial Executives and vice versa. Departments and structures such as Equality, Health & Safety, Legal Services and Education, Learning and Training - that to a varying extent operate in parallel to the mainstream - will in future operate more closely within it. This does not mean a loss of focus in specialist areas of work – quite the opposite. It means joined up strategy and clearer responsibility for delivery of policy in the field.

It follows that this new way of working within the Headquarters central pillar, overseen by the NEC, must be mirrored in the new Regional structure. Similarly, as the union develops stronger policy on general trade union and political work, then these policies will be deployed in a much more robust and consistent way across our Regions.

4.2 A New Regional Executive Committee

We will introduce a new Regional Executive Committee that will bring together the key people within Regions covering all areas of CWU work, connecting all parts of the union's work in a single body. Introducing this new Regional Executive body is fundamental to creating the support mechanisms required to make Regions more accountable and dynamic – the place to be – rather than just a necessary add-on.

Alongside a rejuvenated agenda and an inclusive new programme of work, the Regional Executive Committee will provide a strong foundation for the CWU to drive forward our wider trade union and political work and help create a platform for the CWU to prosper and grow. This committee will oversee and monitor the work of the Region in between full Regional meetings and will comprise of the following:-

- Regional Secretary
- Assistant Regional Secretary (Expanded communication role, see below)
- Regional Chair
- Regional Political Officer
- Designated NEC member
- Regional, Territorial or Field Lead Industrial Representatives from both constituencies
- The four Regional elected leads on our equality strands (replacing the current Advisory Committee structure)
- Regional Lead on Health and Safety
- Regional Lead on Education, Learning and Training
- Regional Lead on Young Workers
- Regional Lead on Retired Members

The Regional Executive Committee will meet four times a year in between full Regional Meetings.

The NEC believe it's now time to operate Regions on a fully one union basis. Within this, the NEC recognises that there will be legitimate concerns that the larger Postal constituency could dominate in all these roles. However, if we are to become a more joined up and connected union we believe that responsibility and trust will have to underpin the elections for these roles. The challenge we are setting is for Branches and Regions to work together to ensure that our democracy delivers structures that are inclusive and
a place where representatives from all constituencies are at the centre of Regional activity. The NEC will monitor this closely and undertake a full review after two years, or earlier if we do not believe inclusivity of our constituencies is being delivered on the ground.

- The formal inclusion of an NEC member on the Regional Executive Committee is an essential ingredient, creating a two-way process that connects the work of the Region with the NEC.

- The job description of the Regional Secretary will be given greater clarity and authority, in line with the purpose of Regions and the work programme set by the NEC.

In a similar way, we will provide greater clarity on the role of Assistant Regional Secretary and this will include substituting for the Regional Secretary, when necessary, on a more formal basis. Additionally, we want to expand this role to support Regional communications and campaigning. This is something we will develop through our Head of Communications as a new initiative to further strengthen our overall approach to communications and engagement.

4.3 Branch Attendance at Regional Meetings

The Regional structure can no longer be viewed as optional for Branches any more than it would be acceptable for it to be optional for Branches to say they would not be involved in politics or organising or campaigning. There will be a clear expectation that Branches will participate fully in the Regional structure by sending delegates to meetings and ensuring that those delegates are in a position to represent the view of the Branch and vote on issues as necessary.

Meetings and agendas will have to be relevant, interesting and output and action driven to ensure the best use of time for those in attendance.

4.4 Full Regional Meetings

- The full Regional Committee meeting would take place, as now, four times a year and would be constituted under rule as a body that all Branches within the Region must attend.

- One of the annual meetings would be set aside for a Regional Conference/event that would give a much higher profile to the work of the Region. These type of events have already taken shape in the North West, Midlands and London Regions and have proven to be a positive development.

- Regional meetings would operate under the direction of the NEC and would mirror a newly constituted NEC work agenda/programme, with the opportunity to develop Regional priorities alongside this. Within the general direction of the union, we will encourage Regions to develop strategies and policies that can be tailored towards the specific political and economic circumstances that relate to their area. Similarly, they will be encouraged to develop stronger links to communities and more localised campaigns.

4.5 The Responsibilities and Role of the New Regional Committee

We will provide greater clarity on the responsibilities and purpose of a new Regional Committee, as follows:-

- To work under the direction of the NEC and oversee all non-industrial work within the Region.

- To support the development of the union’s work within the wider trade union movement, including building stronger links to TUC regional structures.

- To support the development of the union’s political work, including building stronger links with the relevant Labour Party structures.

- To support the development and delivery of a new Organising and Recruitment strategy.

- To support the development and delivery of a new Education, Learning and Training Strategy.

- To support and oversee the work of our Branches and implement strategies that will raise overall standards and improve consistency, including the fourteen measures of success.

- To develop Regional priorities and campaigns that supports the general strategies of the union.

- To support the development of the union’s Communications and Engagement Strategy.

4.6 Regional Sub-Committees

Within the current rules of the union the following Regional Sub-Committees are catered for :-

- Regional Women’s Committee
- Retired Members Regional Committee
- Young Workers’ Regional Committee
- Regional Political Committee
- Regional Equality Officers Committee
- Regional Learning Committee
Although not catered for in Rule, there is also a Regional Health and Safety Forum that has the ability to submit motions to Annual Conference. Currently, this appears to have no formal link to our existing Regional structure or other parts of the union. The NEC will propose that the existing Regional Health and Safety Forum becomes a Regional Health and Safety Committee under the new structure and sits under Rule within the Regional structure.

In practice, what we have now is a multitude of meetings taking place across the union with little meaningful co-ordination or understanding of how they relate to the whole. There is a completely inconsistent approach to how these operate, including a lack of clarity over their purpose and desired outcomes. We are proposing an amended sub-committee structure and as we move forward these will be reviewed to ensure we have clearer objectives, better co-ordination and an output that supports the overall work of the Region and union.

4.7 Regional Equality Structures

The importance of our equality work will be reflected in a new strengthened Regional Equality structure that will bring together the four equality strands under a single inclusive and expanded Regional Equality Committee. This Committee will be charged with overseeing and joining up our equality work, whilst also maintaining the principles of “safe spaces” for minority groups to discuss their own issues through specialist meetings and events. Branches in the Region will elect four equality leads to represent Women, BAME, LGBT and members with Disabilities on the Regional Executive Committee. These four leads shall have an important role to play in establishing a vibrant Regional Equality Committee, and developing and delivering equality activity across the Region to ensure the increased participation and representation of under-represented groups at all levels in the union. This new structure will replace our existing National Equality Advisory Committee structure and will place equality at the heart of our Regional structures, with stronger links to Branches, workplace reps and our Regions. (See Redesign Equality Paper).

4.8 Regional Funds

In considering the funding and resources required to support a new Regional structure, it’s important to recognise that we already spend around a £1 million per annum on the existing arrangements.

We are proposing to consolidate the existing Regional funds into one fund and we believe it will be possible for a new Regional structure, as outlined above, to operate in a more cost effective way and better utilise existing resources/funds.

We will review these funding arrangements, at an appropriate point in the future, once the structures are established.

APPENDIX A – REGIONS RECOMMENDATIONS

1. That the CWU adopts the following clear aims and objectives for a new Regional Structure:
   - To work under the direction of the NEC and oversee all non-industrial work within the Region.
   - To support the development of the union’s work within the wider trade union movement, including building stronger links to TUC regional structures.
   - To support the development of the union’s political work, including building stronger links with the relevant Labour Party structures.
   - To support the development and delivery of a new Organising and Recruitment Strategy.
   - To support the development and delivery of a new Education, Learning and Training Strategy
   - To support and oversee the work of our Branches and implement strategies such as the fourteen measures of success.
   - To develop Regional priorities and campaigns that supports the general strategies of the union.
   - To support the development of the union’s Communications and Engagement Strategy.

2. That the NEC draw up clear new role descriptions for the following:-
   - Regional Secretary
   - Regional Assistant Secretary
   - Regional Chair

3. That the CWU introduce a new Regional Executive Committee comprising of the following:-
   - Regional Secretary
   - Regional Assistant Secretary
   - Regional Chair
   - Regional Political Officer
• Regional Lead - Women
• Regional Lead - BAME
• Regional Lead - LGBT
• Regional Lead - Disability
• Regional Lead - Young Workers
• Regional Lead - Retired Members
• Regional Lead - Health and Safety
• Regional Lead - Education, Learning and Training

These positions will be elected by Branches within the Region on a one union basis.

The Regional Executive Committee will also comprise of the following in an ex-officio capacity:-
• Regional, Territorial and Field Industrial leads
• Designated NEC member

4. That the Regional Committee will meet four times a year and that one of those meetings will be a Regional Conference.

5. That the Regional Executive Committee will meet four times each year in between Regional meetings.

6. That attendance of Branches at Regional meetings will be made a priority commitment.

7. That the following 6 Regional sub-committees be established under Rule which will meet four times a year:

   • Regional Equality Committee – comprising Women's Officers, Equality Officers, BAME Officers and other representatives from the four equality streams
   • Regional Health and Safety Committee comprising Lead Health and Safety Representatives from all Branches
   • Regional Young Workers Committee – no change
   • Regional Retired Members – no change
   • Regional Education, Learning and Training Committee to comprise Lead ULRs and Branch Secretaries
   • Regional Political Committee – no change

8. That decision-making by ordinary majority be introduced under Rule for all Regional meetings.

9. That a new Regional funding system be introduced that consolidates the existing Regional Fund, the Regional Women's Fund and the Regional Learning Fund into one funding stream that will then be distributed on the basis of a bidding system based on clear plans and clear measurable outputs. These funding arrangements to be reviewed before General Conference 2021.

10. That each Region will develop and submit a Biennial Regional Development Plan to the NEC. The Report will be submitted within 3 months of the start of the term of office.

11. That the above new structure and process will be subject to monitoring and review by the NEC and that a report will be brought to Branches before Biennial Conference 2021.

12. That the NEC will draft a new Regional Constitution accordingly to include these changes.
2. Why We Believe in Equality

To set the scene we think it's worthwhile to succinctly reassert the reasons why CWU believe in equality.

We focus on equality, and have specific provision for equality issues under our Rule Book, for a number of reasons.

• Firstly, as an organisation, to make us stronger, we must reflect the members we want to recruit and represent, and the truth is we don't currently do so. So we need strategies to bring forward people from different backgrounds and groups to make the CWU more representative.

• Secondly, we believe in equality of opportunity. No matter what your background is, we believe everybody should have an equal chance to have their voice heard in the CWU as a democratic union. No one should be disadvantaged because of a disability, their gender, their sexuality or their race and this means we need strategies in place to ensure the discrimination and disadvantage minority groups face in wider society, don’t prevent people from playing a full role in the CWU.

• Thirdly, we want to make sure our policies - both industrial and political - reflect a broad range of concerns and tackle the discrimination and barriers we know certain groups face at work and in society. In order to ensure this happens, we need to make sure views of particular groups - which may be in a minority - are fed into our decision-making processes and become part of the mainstream.

These are the aims we need to judge our existing equality work and structures against and inform the changes we are proposing.

3. The Existing CWU Approach

The union currently operates its equality work through the following structures:-

3.1 Under National Rule we have a CWU Assistant Secretary Equal Opportunities who heads up the Equality Department at CWU Headquarters and is responsible for leading on equality issues. Since Linda Roy left the union in early 2018, this position has been vacant, pending the outcome of the reorganisation of our Headquarters and the redesign process.

3.2 Under National Rule there are four National Equality Advisory Committees:-

• WAC – Women’s Advisory Committee
• RAC – Race Advisory Committee
• LGBT – Lesbian, Gay, Bisexual and Transgender Advisory Committee
• DAC – Disability Advisory Committee

The Advisory Committees each meet three times a year for half day meetings which take place at CWU Headquarters.

Each Advisory Committee comprises of seven members from the Postal constituency and six members from the T&FS constituency. These representatives are elected by and from each separate constituency in a Branch ballot held before General Conference. Each Committee then elects its own Chair and Vice Chair.

The Chairs of each Advisory Committee are currently on the NEC in an ex-officio capacity – i.e. with no right to vote.
3.3 Under National Rule the union holds four separate Equality Conferences each year (Women’s, BAME, LGBT and Disability). From the motions debated at each Conference, two motions from each will go forward to General Conference and one motion from each to the respective industrial Conferences. The motions that go forward are selected by the delegates from each Conference in a priorities ballot.

The members of the Advisory Committee oversee the Conferences, setting policy on the motions submitted by Branches and responding to debates from the floor.

3.4 Under National Rule CWU Regions are due to have a Regional Equality Officers Committee and a Regional Women’s Committee.

3.5 Under National Rule CWU Branches are due to have an Equality Officer, a women’s representative and a BAME representative.

3.6 The Equality Department also organises the following annual events:-

- Equality Officers Seminar
- BAME Officers Seminar
- Women’s Officers Seminar
- Regional Equality Committees Chair and Secretaries Seminar

4. The Case for Change

4.1 In critiquing our equality work and structures we recognise that over many years the union has moved forward equality and there is no doubt that we have many committed activists, past and present, who have made a very important contribution in campaigning for and raising the profile of equality issues.

However, we must also recognise that the CWU has never really set clear objectives upon which the ongoing success or otherwise of our equality agenda can be measured. Furthermore, the structures we introduced many years ago to support equality, which at the time would have been seen as progressive, now appear outdated and seem to have become an end in themselves – rather than a means to an end.

4.2 The existing structures operate in parallel to mainstream union work and the single most striking observation is that there is no meaningful link between what happens on the Advisory Committees, the NEC, Industrial Executives and Regional Equality Committees. With a few exceptions, the Advisory Committees operate mostly in isolation to the rest of the union and for that matter to each other. We are clear this is in no way the fault of any of our equality activists - their experience is invaluable and underutilised – it is the consequence of introducing parallel structures and not thinking through how these relate to other parts of the union.

If we are honest, the result of this is that campaigns on equality issues are not taken forward by the union as a whole – and can be seen as separate/niche matters – and also the union’s key campaign priorities rarely address issues from an equalities perspective. At the same time, we do not believe the existence of parallel structures is serving as a pathway to bring people from different backgrounds through, but creates a separate strand that sits outside of our mainstream work.

With our organisation structured in this way, the NEC believes the opportunity to develop a cohesive equality strategy will always be severely limited.

4.3 A further consideration must be whether or not the current set up is assisting in growing engagement and understanding across the union on equality issues. In raising this we accept that structures in themselves are not the only driver of engagement, it is equally about the clarity of your objectives and the quality of your message.

We also accept that there has never been anything near full buy-in to equality within the union and that this, to some extent, reflects the position in wider society. However, what cannot be ignored is the fact that parallel structures will always limit the reach of any agenda. The truth is, what we have now allows those who have not bought into continue to disengage and be comfortable in the belief that equality is the responsibility of others.

4.4 For the reasons outlined above the NEC are firmly of the view that the status quo is not an option and that it’s time to completely freshen up all aspects of our equality work.

5. Proposals for Change

- A Fresh Approach to Equality

As part of Redesign, the NEC are putting forward a set of proposals which will bring significant change to our whole approach on equality work.

To consider these proposals in their proper context they must be viewed in conjunction with other elements of Redesign, in particular the reorganisation of Headquarters and a newly constituted NEC and Regional structure.
The consistent thinking that flows through all the above is the need to connect structures across the union and breakdown silo working. Therefore, the single principle underpinning our new proposals is to bring our equality agenda into the mainstream structures of the union. This will mean replacing the existing Equality Conferences, Advisory Committees and NEC ex-officio seats (Women, BAME, LGBT, Disability), with mainstream alternatives that will deliver a greater focus on equality issues. Alongside this, we are committed to developing a proper strategy with clearer objectives that will emerge from collective responsibility and “a one union” approach.

The new proposals are set out below and given they replace the various elements of how we work now, with mainstream alternatives, should be viewed as an overall package of change.

5.1 NEC

- The existing four NEC ex-officio seats (Women, BAME, LGBT, Disability) will become full voting members of the NEC. These positions will be elected in an individual member ballot in line with the process set out in Appendix A of the National Structures document, whilst maintaining the existing NEC Constituency balance. (See Redesign National Structures paper).

- The representatives elected to these positions will have exactly the same overall responsibilities on NEC decisions and issues as other NEC members. Additionally, these individuals will focus on supporting equality work.

- Although we do not envisage these NEC positions being full time roles, we do anticipate some investment in time and facilities over and above what the existing Advisory Committee Chairs utilise.

- The new NEC elected positions will work with Headquarters in Regions and Branches in bringing a more consistent approach to equality issues throughout the union.

5.2 CWU Regions

- The existing Advisory Committees (a total of 52 positions) will be replaced by four new seats (Women, BAME, LGBT and Disability) in each CWU Region (a total of 40 positions). These new Regional Equality seats will form part of a new Regional Executive Committee and overall new Regional structure (See Redesign Region’s paper).

- The new Regional Equality seats will be elected by the Branches within each Region, on a one union basis.

- The new Regional Equality positions will be responsible for liaising with their national counterparts and the Branches within the Region to support more consistency on the union's equality agenda. They will also play a role in developing the work of the Regional Equality Sub-Committee, including planning more accessible networking and safe environment events, whilst also providing reports to full Regional meetings.

- The new Regional Equality positions will come together in a meeting with their NEC counterparts and CWU Headquarters twice a year. These will be two-day meetings which will enable the separate equality strands to meet on the first day and all strands to come together on the second day.

5.3 CWU Equality Conferences

- The existing CWU Equality Conferences will be replaced with a new structure that needs to be viewed in conjunction with the plan to introduce Biennial Conferences. (See Redesign Conferences’ paper).

- In conjunction with the proposed move to Biennial Conferences, we propose to add a full day on equality to our General Conference. This day would focus solely on the CWU equality agenda with time allocated to each strand alongside general equality matters.

The day would be divided into motions, NEC reports that can be amended and plenary sessions with the opportunity for high profile speakers when relevant.

- In the year between Biennial Conferences we will introduce a new National two-day equality event.

On the first day representatives from the separate equality strands will meet in a similar way to the existing Equality Conferences. On the second day all the equality stands will come together.

The two-day National event will be carefully planned to support the development of our equality strategy and at the same time will be used to place CWU at the cutting edge of wider trade union and Labour movement debates.

The two-day event will also be specifically designed to support the continuation of networking and the safe environments that are fundamental to the development of equality work.
5.4 How we will lead Equality at CWU Headquarters

• To fully appreciate the way equality will operate and be led at Headquarters, it is essential that Branches look at the separate communications that provide the detailed information and rationale for the introduction of a reorganised and streamlined HQ structure.

• Going forward CWU HQ will be reorganised around a three pillar structure, with a Central Policy and Services pillar operating together in a more formal and accountable way than currently exists.

Within the new Central Policy and Services pillar the existing Equality Department will merge with the Education, Training and Learning Department and will be headed up by one National Officer who will lead on both work areas. There is a natural synergy between these subjects and in future greater emphasis will be placed on Education, Training and mentoring to support the delivery of our equality agenda. This will include a new programme highlighting the importance of our anti-racism work.

• The way in which the Central Policy and Services pillar will work in the future, will provide far greater support and co-ordination than exists now within the stand-alone Equality Department.

• Similarly, a newly constituted NEC with equality strand leaders and the new Regional equality positions are also designed to form a stronger collective approach to leadership.

• The NEC firmly believe that the overall structures outlined above will enable better leadership of our equality work as well as embedding greater co-ordination and accountability across the union. On this basis we are proposing to cease the position of an elected Equality Officer.

5.5 Developing a Proactive Strategy with Clearly Defined Objectives

• Perhaps the most significant part of how we lead on equality is for the union to develop a proper strategy with agreed, well communicated and clearly defined objectives, upon which we can then measure our future success.

• Developing such a strategy will be a priority under our new approach, although it must be recognised that constructing serious strategy is in itself a major piece of work that will take time. Bringing equality into mainstream structures is crucial to this process.

• The aim will be to create a ‘one stop’ reference document covering all aspects of our equality work, including our objectives, Conference policy, training and mentoring and a factual breakdown of the makeup of all CWU representative structures covering gender, ethnicity and diversity. This is not about setting arbitrary targets, instead it is about creating a live and organic document, with quality information that can be updated and made available to the whole union.

• Defining objectives is an essential part of any strategy and we want to do this through proper consultation and again this will take time. To assist this process the NEC believe defining objectives should be broken down into the following areas:-
  - What is it we want to achieve in making all CWU representative structures better reflect the gender, ethnicity and diversity of the membership?
  - What is it we want to achieve with our members in the workplace?
  - What is it we want to achieve within the companies where we represent members?
  - What is it we want to achieve in the wider society?

5.6 Linking Equality with our Industrial Work

It is important to build a much stronger and consistent link between our equality agenda and the work of our Industrial Executives. This will be achieved through the following:

• The new NEC equality strand members will work more closely with the Industrial Executives to support our equality objectives in the workplace.

• The new NEC equality strand members will work more closely with the Industrial Executives to support our equality objectives in the companies where we represent members.

• The agenda for Industrial Executive meetings will be structured in a way that allows for regular reports on the progress in delivering our objectives.

• All the initiatives required to deliver our equality objectives in the workplace and in the companies where we represent members will be the responsibility of the Industrial Executives. Progress on this will then be reported to the NEC.
5.7 CWU Branches

• The NEC recognises that building support and understanding amongst Branches will be crucial to a more effective equality strategy. This is about developing a more supportive approach, whilst also introducing a range of measures to monitor more closely the effectiveness and consistency of our equality initiatives in each Branch. This will include attendance at national events, the makeup of delegations and the take up of training and mentoring programmes.

• The new mainstream structures at NEC and Regional level will also have a key role in supporting, developing and overseeing our equality work at Branch level.

• As part of our Branch work, the NEC believes it’s time to review and clarify the roles and responsibilities of Branch Equality Officers, Women and BAME representatives.

5.8 CWU Delegations

We are proposing to review the makeup of all CWU delegations to the TUC, Labour and international events, etc., to ensure they reflect the gender, ethnicity and diversity of the membership.

Conclusion

The proposals outlined in this policy paper are comprehensive and offer a fresh start to how the CWU take forward our equality work.

The NEC believe there is a strong sense, across the union, that our existing approach, which may have served us well in the past, is no longer fit for purpose and has reached the limit of what it can achieve.

By bringing all equality work into the mainstream structures of the union, the CWU will develop an overall sense of direction, clearer objectives, proper co-ordination and greater clarity over precisely what it is we are trying to achieve.

APPENDIX A – EQUALITY RECOMMENDATIONS

1. The existing four NEC ex-officio seats (Women, BAME, LGBT, Disability) to be converted to full members of the NEC with full voting rights, whilst maintaining the current constituency balance within the overall makeup of the NEC.

2. The four new NEC equality strand seats to be elected by the membership in an individual member ballot (on a constituency basis see National Structures paper).

3. The four new NEC equality strand seats to have the same overall responsibilities on NEC matters and decisions as other NEC members, whilst also focusing on supporting the development of our equality work as outlined in para 5.1 of this policy paper.

4. The existing Equality Advisory Committees will cease and be replaced by four new positions (Women, BAME, LGBT, Disability) in each CWU Region. These Regional Equality seats to form part of a new Regional Executive Committee and overall new Regional structure.

5. The new Regional Equality positions to be elected by the Branches within each Region on a one union basis.

6. The role and responsibilities of the new Regional Equality positions to be developed as outlined in para 5.2 of this policy paper.

7. The existing four Equality Conferences to cease and be replaced with a full equality day added to a Biennial General Conference. Additionally, in alternate years the provision of a new national two-day equality event as outlined in para 5.3 of this policy paper.

8. The provision for a full day on equality at General Conference will be scheduled to allow time for motions and reports on each separate equality strand, as well as general equality issues.

9. The role of a separately elected National Officer for equality will cease.

10. That a new equality strategy be developed as outlined in para 5.5 of this policy paper.

11. That stronger links be developed with CWU equality work and the Industrial Executives as outlined in para 5.6 of this policy paper.

12. That a programme for Branches be developed as outlined in para 5.7 of this policy paper.

13. That we review the roles and responsibilities of the Branch Equality officer, Women and BAME representatives.

14. That we review all CWU delegations to ensure they reflect the gender, ethnicity and diversity of the membership.
EXISTING EQUALITY/PARALLEL STRUCTURE

**CWU Headquarters** – single stand-alone department.

**NEC** – four Equality strand seats (Women, BAME, LGBT, Disability) in ex-officio capacity, i.e. with no voting rights.

**NEC** – the four ex-officio equality strand seats elected by each Advisory Committee.

**Four Advisory Committees** (WAC, RAC, LGBT, DAC) thirteen members on each Committee, constituency based, 52 positions.

**Advisory Committee members** – Elected by Branches, constituency based.

**Advisory Committees** – no formal link to NEC, Industrial Executives, Regions and Branches.

**Conferences** – Four separate equality strand Conferences with limited ability to submit motions to General Conference.

NEW EQUALITY/MAINSTREAM STRUCTURE

**CWU Headquarters** – reorganised/streamlined through new merged department, supported by new Central Services pillar.

**NEC** – four equality strand seats (Women, BAME, LGBT, Disability) with full voting rights i.e. same status as other NEC members.

**NEC** – the four full NEC equality strand seats elected by the membership.

**Four Regional equality seats in each Region** (WAC, RAC, LGBT, DAC) Non-constituency based, 40 positions

**Regional seats** - elected by Branches within each Region on a one union basis

**New Regional Equality seats** – formal link to all mainstream structures of the union.

**Conferences** – new full equality day added to a Biennial General Conference, increased ability to submit motions.

**New two day National Equality Event** – in the year between Biennial Conferences the introduction of a new two day National Equality event.
1. INTRODUCTION

This paper is designed to address the issue of the National Structures of the CWU under the Redesign Project. In doing so it also provides the key findings from the Redesign National Consultation on this issue and the changes proposed are made in order to connect the recommendations made in other areas of the project i.e. our Regional Structures and our new approach to our equalities work. The proposals made embed our aims of inclusivity across the CWU as well as ensuring the connectivity required for the CWU to move forward on our wider trade union and political agenda as one union.

The proposals for changing our National Structures will be debated and voted on at the Special Redesign Conference on the 3rd and 4th November 2018.

2. Key findings from the National Consultation on National Structures

The following covers the main points from the many similar and diverse views that came from Branches in the National Consultation.

There were a total of 1,142 different responses to the 8 questions set out in the National Structures section of the Consultation document.

National Executive Council

Most Branches were in agreement that there are significant structural, geographical and cultural barriers to some activists standing for election to the NEC. The disruption to family life, the need to effectively relocate to London and the need to be a member of an Industrial Executive were all seen as preventing some people from standing for the NEC.

Clearly, despite good representation from women we also still see a less than proportional ruling body in terms of mainstreaming proportionality and although efforts have been made to involve the Chairs of the Advisory Committees in the NEC, it is in a restricted ex-officio capacity only and not a fully representative role.

In the consultation document we differentiate between the roles and responsibilities of NEC members and Industrial Executive members, and although there is certainly some overlap in terms of the skills and experience required for both roles arguably the two roles are different, with very different commitments and demands. It is perhaps time to consider whether the NEC role should no longer automatically be a dual role by allowing those who wish to hold an NEC role to stand solely for that role but not to rule out individuals who wish to stand for both the NEC and Industrial role.

Branches questioned the lack of opportunity for activists from non BT or Royal Mail employers to successfully stand for the NEC. In a changing world of work, the NEC has to find ways to be more representative of members working outside the major two employers if we are to genuinely become a more inclusive union.

3. The Case For Change

The NEC, within Redesign, have created the space for the CWU to have a debate about how we restructure the way we operate. We have done this because the Redesign Project represents a once in a generation opportunity to fundamentally change our union to support our agenda of reasserting trade union values and changing the balance of forces in the world of work and wider society.

It is right, therefore, that we grasp this opportunity by embracing those changes that help us deliver a more inclusive and connected union by ensuring the makeup of the NEC and the way it operates reflects and delivers those ambitions.

As a result we envisage a newly constituted NEC made up of members who are representative of a broader spectrum of the membership. It is about ensuring that the CWU NEC is as reflective of our membership and society (the people we want to attract into our union), as it can possibly be and we do not believe that right now the current process either delivers or meets that aspiration.
4. Proposals for Change

We are proposing to change the makeup of the National Executive Council, based on the following principles:

• The need for a newly constituted NEC to better reflect the work the NEC is actually responsible for (i.e. non-industrial).

• The need for the union’s NEC to be more inclusive and better reflect the gender, ethnicity and diversity of the membership.

• The need to mainstream our equality agenda and build a connected structure to Regions and Branches.

The proposed changes include the following:

4.1 Equality Strands

The current NEC has representation from the 4 equality strands, Women, LGBT, Disability and Race (BAME) on an ex-officio basis. The NEC believe that we must now embed what we already have by elevating representatives from these strands to full voting members of the NEC. We take the view that if we are to reach out and be truly inclusive and representative not just of our membership but also of society in general then this is best achieved by the proposal we make. Additionally, it connects exactly with the proposal we make on equalities in general and particularly on the way we propose that this issue is dealt with within our Regional structure. (See Regional & Equality papers).

In order to ensure a balance between the two constituencies the 4 equality strand members would be on the basis of 2 from each constituency. These seats would rotate between the 2 constituencies at every (2 year) election cycle i.e. the two seats occupied by T&FS members at the first election cycle would be filled by Postal constituency members at the following NEC election cycle and vice versa.

4.2 Young Workers

We are proposing to bring two young workers onto the NEC with full voting rights. This will be on the basis of one young worker from each industrial constituency.

This is being done to enhance the role of young workers within the CWU. If we are to genuinely reach out and make inroads into the “gig economy”, address the issues of worsening exploitation of young workers across the whole economy, then we need to be seen to bring a stronger voice for young workers at national representative level.

In addition to this change we need to develop a new approach to young workers within the CWU. In reaffirming our commitment in this area we now need to strengthen our young workers agenda.

We need to develop a position whereby our young workers are seen as a self-determining group. In conjunction with CWU HQ, we want our young workers to work on producing plans that ensure the activities they undertake place them at the heart of our industrial, political and community campaigning work.

If we are to reach out to more young workers then we need to show that we are a union that listens to their voice, allows them to develop a pro-active agenda that integrates with our overall aims but most importantly creates the space, through redesigned structures, to enable them to play a pivotal role in our union’s future.

With support from CWU Headquarters, the Young Workers Committee will be tasked with developing such a strategy to be ready before CWU General Conference 2019.

4.3 Retired Members

We propose that the existing ex-officio retired member seat becomes part of the full NEC and is accorded full voting rights. This is subject to the proviso that they would not vote on either financial or Rule/Constitutional changes nor on issues that could be considered to have an industrial consequence. This approach complements the position taken by the NEC in proposing Motion 29 to CWU General Conference 2017.

Additionally, in line with the outcome of Motion 29, it’s time to redesign how retired members engage with the CWU and vice versa. We want the CWU to be an organisation where retired members can still play a significant role in supporting our overall aims, whilst at the same time setting a clear agenda for dealing with those issues that impact upon retired people in wider society.

Starting from the position already accepted that retired members have no input into our industrial work, our retired members, through the existing Advisory Committee and with support from CWU Headquarters, will be tasked with producing a pro-active agenda that positively engages with our retired members on matters that face that demographic. Such an agenda should also set out how they intend to engage and support our overarching agenda. The output of this work will be published in a report from the NEC to General Conference 2019.
4.4 A Newly Constituted NEC

The changes we are proposing to the makeup of the NEC are as follows:

- 11 PE members (including the Chair & Vice Chair)
- 8 T&FSE members (including the Chair & Vice Chair)
- 2 Young Workers (1 from each constituency)
- 1 Retired Member
- 4 Equality strand seats (Women, BAME, LGBT and Disability)

This would be a 26 voting lay NEC that maintains the existing constituency balance. Whilst there is no barrier to an individual standing in more than one NEC category, this measure is designed to encourage greater participation from under-represented groups in line with our commitment to proportionality.

4.5 Status of NEC Members

We are proposing that all NEC members will have equal status on the NEC (except the retired member as outlined above) in terms of dealing with any NEC issues inside and outside of NEC meetings. Therefore, even though an individual was elected to the NEC via a particular route, be that Industrial Executive, equality strand or any other route, their status and commitment would be no more or less than any other elected individual. If they were asked or were required to undertake a task on behalf of or in the name of the NEC then they would have equal authority or status with any other member.

4.6 NEC Meetings

We are also recommending a change to how the NEC operates. In the same way we envisage a different approach to our General Conference we want NEC meetings to be more meaningful, the NEC the current process of mainly document-based meetings that are usually framed around a straight yes or no/take it or leave it approach, to be unnecessarily adversarial.

We would envisage 7 x 2 day meetings in a calendar year. These meetings would be diarised to ensure we meet approximately 7 to 8 weeks apart but to coincide with key events that usually require NEC decisions e.g. CWU budget setting, conference motion submissions etc. The exact timings of the meetings i.e. start and finish times would be for a newly elected NEC to discuss as part of the review of NEC Standing Orders that the NEC has already identified needs to take place.

We will produce more policy and strategy papers that can in turn be developed through our new Conference structures to drive forward the key objectives of the union.

Such papers would then be followed up by regular reporting on the outcomes of the policy enacted, progress made where we have been successful and further actions in areas where we have not. For example, a new Recruitment and Organising Strategy could report on how we’ve met our objectives. A Political Strategy could update on how many CWU members are Councillors or Perspective Parliamentary Candidates. An Education, Learning and Training report could inform on the reach any new strategy has had. We could report on how our new deal for workers strategies are being filtered out and promulgated through the movement and beyond.

These more detailed policy papers will act as a trigger to review and amend polices and strategies in the light of real experiences and we would do this through a less adversarial approach. This is ultimately about working in a more cohesive way where the whole union will develop a greater understanding of our aims and objectives and the consistent approach we need to deliver these.

Additionally, we will be clearer on the link between the agenda of the NEC and the work of Regions. We see the Regions working on our policies and as such, Regional meeting agendas would by and large mirror those of the NEC so we can track the effectiveness of our new approach and our key policies through the organisation.

Within this approach we will of course continue to clear ‘formal business’ based on the normal requirements of any union to make necessary decisions on the day-to-day running of the organisation.

We will continue to ensure that from time to time NEC meetings will be supplemented with keynote speakers that complement our policies and strategies.

4.7 NEC Sub-committees

This issue is currently covered by Rule and under this Rule it would be for the NEC to determine any new committees it believed was required to carry out NEC business.

However, a number of standing committees are contained in the Rule Book and the NEC it’s time to review these. This will cover the purpose of each sub-committee, its contribution to our one union approach and its overall effectiveness in relation to the more strategic work set out in this document. The output will be to introduce a more effective way of conducting sub-
committee business by seeking to mainstream as much of this work as possible into the full NEC.

4.8 Industrial Executives

The NEC is mindful of the difficulties the Industrial Executives have had in dealing with major issues that has resulted in us not meeting the timeline required for the Redesign approach to the Industrial Executives to be included in this policy paper. We are also mindful that the process for the Industrial Executives is in any case sequential to the need to address the National Executive Council and its structures. Therefore, the Redesign approach to our Industrial Executives will be the subject of a further report to General Conference 2019.

APPENDIX A – REDESIGNING NATIONAL STRUCTURES - RECOMMENDATIONS

The National Executive Council

1. A newly constituted NEC be agreed comprising of the following:
   • A total of 26 seats
   • 11 NEC seats will be for members elected to the PE (including Chair & Vice Chair)
   • 8 NEC seats will be for members elected to the T&FSE (including Chair & Vice Chair)
   • 2 NEC seats will be for Young Workers (1 from each constituency)
   • 1 NEC seat will be for a Retired Member
   • 4 Equality strand seats (Women, BAME, LGBT, Disability)

NEC Sub-committees

2. That the NEC reviews the existing National Rule covering NEC sub-committees, their roles, responsibilities and effectiveness. The review to ensure that a subsequent sub-committee structure supports the new way of NEC working outlined in this document.

Industrial Executives

3. That as a further phase of Redesign, the NEC will publish a policy paper to General Conference 2019 on the redesign approach to our Industrial Executives.

Young Workers

4. That in conjunction with CWU Headquarters, the National Young Workers Committee will be tasked with producing a proactive strategy that integrates with the union’s industrial and political aims and supports the need to bring through a new generation of representatives. A report covering this will be published by the NEC to General Conference 2019.

Retired Members

5. That in conjunction with CWU Headquarters, the National Retired Members Committee will be tasked with producing a proactive strategy that integrates with the union’s wider trade union and political aims and sets out a clear agenda on the issues that impact upon retired people in wider society. A report covering this will be published by the NEC to General Conference 2019.

6. That the election arrangements for the NEC will be as set out below:

The NEC will consist of 26 lay members elected biennially.

The composition of the NEC is as follows:

a) 11 NEC members elected by and taken from all members in the Postal Constituency whom in accordance with the Rules of the CWU shall automatically be members of the respective Industrial Executive. This shall be inclusive of the Chair and Vice Chair of the Postal constituency.

b) 1 Postal constituency Young Workers member elected by and taken from all members in the Postal constituency.

c) 8 NEC members elected by and taken from all members in the Telecoms and Financial Services constituency whom in accordance with the Rules of the CWU shall automatically be members of the respective Industrial Executive. This shall be inclusive of the Chair and Vice Chair of the Telecoms and Financial Services constituency.
d) 1 Telecoms and Financial Services constituency Young Workers member elected by and taken from all members in the Telecoms and Financial Services constituency.

e) 1 Retired member elected by and taken from all members of the Retired Members sector.

f) 4 Equality Strand lay members (1 each from Women, BAME, LGBT and Disability). From the date of introduction 2 strand members will be elected by and from all members in the Postal constituency and 2 strand members will be elected by and from all members in the Telecoms and Financial Services constituency. The NEC will be responsible for the allocation of the 2 seats to each constituency. The selection will be reversed at the next series of elections i.e. after a 2 year period.
1. Introduction

This policy paper provides a summary of the key findings from the Redesign Consultation on Conferences and sets out our proposals for a new approach to CWU Conferences that will be debated and voted on at the Special Redesign Conference on the 3rd and 4th November 2018.

2. Summary of the Key Findings from the Redesign National Consultation on Conferences

The following covers the main points from the many similar and diverse views that came from Branches in the National Consultation.

There were a total of 940 different responses to the 8 questions set out in the Conferences section of the Consultation document.

2.1 The move from Annual to Biennial Conferences

57% of respondents agreed in principle to the move to Biennial Conferences and 82% felt that it should be about setting long term strategies and policies. There were various reasons given for this including declining attendance, the significant costs of Annual Conference to Branches and the General Fund, the need for Conference to concentrate on strategic direction and long term goals and the change in lifestyle meaning a week every year is too much for those with work and family commitments. However, many of those who agreed that a move to a Biennial Conference would be a positive thing were also very clear that there were caveats to that support. These caveats were focussed on the need to ensure that Branches could act and influence policy on matters of a serious or urgent nature in between Conferences through access to democratic decision-making forums or Conferences in between scheduled Conferences. A number of Branch responses opposing a move to Biennial Conferences were based around their legitimate concerns that the union's democracy would be undermined and that the role of ordinary activists in setting policy would be diminished by this change.

2.2 Format of General and Industrial Conferences

There was a large majority of Branches in favour of Conference being designed to set long term strategic goals and objectives. Although a majority of responses expressed the view that a motion-based Conference was the best way of conducting Conference, many of those responding in this way went on to express support of the report and amendment based model as well. There was significant support for changing how we do things.

2.3 Policy Forums

There was significant support for a clearer role for decision-making policy forums which would take place in between Conferences to ensure strong branch involvement and grassroots activist input to decision-making. Many Branches felt that these arrangements worked reasonably well in between Conference as a democratic safeguard. A number of Branches wished to see a review of the arrangements by which Branches could call a Policy Forum to ensure that these were not just in the gift of the Officer or the Executive. There were also a number of Branches who wished to see the introduction of electronic voting and video conferencing to allow all Branches to participate in these events without necessarily incurring the cost of travelling.

2.4 Equality Conferences and other Conferences

66% of responses indicated support for moving to a single Equality Conference. It has to be said that this comes on the back of increasing numbers of Branches attending midweek Equality Conferences and does not seem in any way to be driven by a disregard or lack of support for the equality strands in the CWU. Many of those who supported one equality event saw this as a positive development that would widen the audience in the union for equality debates and make the event much more high profile. There were concerns that within a larger single Equality Conference there should be space and time for the separate equality strands to meet and discuss their specific issues. Many
Branches cited the practical benefits in moving to a single Conference, with one venue booked for two days saving time and resources. Many Branches felt that attendance and participation would actually improve as more delegates were able to attend this enlarged event rather than struggling to attend all four as happens now in some cases.

Some Branches were clear that although they would be willing to support such a move, they wished to ensure that delegations were large enough to ensure representation from all the strands and that there should be no restrictions on the numbers of motions. The question was also raised as to whether a larger more joined up single Conference could set CWU policy without the need for this to be endorsed again by General Conference or whether there was a way of ensuring that equality motions were guaranteed to be heard at General Conference.

There were concerns raised by Branches not in favour of this course of action that it would cause a lack of identity to the different strands and that we would lose the “safe spaces” for individual strands and it is important that this is addressed fully in any recommendations.

What is clearly very important is for our equality work to be “hard-wired” to the mainstream of the union and for our structures to make this possible.

2.5 How we table and debate motions?

Branches had many ideas and observations on how we could make sure that we get through our Conference agenda in a more efficient and effective way. There was a degree of frustration from Branches with regards to the fact that with a crowded agenda we spend too much time debating things that everyone agrees on, and that important motions get missed when we run out of time and do not complete all the business. There was also a great deal of support for the Standing Orders Committee and the work they do. Branches were keen to make Conference more streamlined and to make sure that our time is spent as usefully as possible.

Most Branches were reasonably content with the current system of submitting motions.

There are however some inconsistencies which have become apparent after the last few years whereby we could potentially end up with conflicting policy on the same issue from one Conference to the other. For example, under current arrangements one of the industrial constituencies could conceivably adopt a policy on Health and Safety, Training or Equality that could completely contradict General Conference policy. A Regional Health and Safety Forum could potentially adopt policy that is contrary to their own Regional Committee policy or the Equality Conferences could adopt policy that may be in conflict with CWU policy.

3. The Case for Change

The existing Annual Conference format and structure of Conference has remained mostly unchanged for many years and the NEC believe there is a consensus across the union that our whole approach to Conferences needs to be freshened up and modernised. The reality is the pace of change and the complexities facing trade unions in the workplace and wider society now require more connected and better thought out strategies to support our members. It also follows that we also need the time to develop and execute these strategies and this is not possible within an Annual Conference cycle.

In the consultation process whilst a majority of Branches indicated support for a move to Biennial Conferences, this was on the basis that assurances were given that Branches could act and influence policy on matters of a serious or urgent nature in between Conferences. The NEC believe that there is a strong case to move to Biennial Conferences, providing the union introduces a more flexible approach to dealing with important issues of a contemporary nature between Conferences. This can be achieved by strengthening the process for the calling of Policy Forums, including giving Branches more access than currently exists to determine these.

When it comes to the format and structure of our Conferences, the NEC also believes our current approach based on motions only, severely limits our ability to engage the whole union in quality debates and strategies that can counter the more complex challenges facing our members. Instead what we need is a Conference that enables the development of proactive strategies that put the union on the front foot. The existing format neither does that nor does it provide the level of debate required to build understanding of these strategies and our ability to deliver them across the union. Furthermore, the annual cycle of Conference also inhibits these objectives. Before we have even dealt with the terms of many motions, we are back into the cycle of a further set of policy debates, rather than concentrating on executing the previously agreed policy.

It is also clear that the National Consultation demonstrated that there are other reasons why this is the right time to move to a Biennial Conference structure. Branches highlighted the decline in numbers of people attending Conference as well as changes in lifestyle whereby a week every year can be too much for those with work and family commitments. We echo the sentiment that a number of Branches expressed regarding the significant cost to Branches and the national union.
In a redesign project where one of the key drivers is to produce a sustainable organisation, the issue of cost is not one that can be ignored. We need to be honest with each other about the ongoing affordability of a number of aspects of our operation. In this regard an Annual Conference is a significant cost both to CWU HQs and to Branches. The last two years have a recorded cost to CWU HQ of £340k each year for Annual Conference. The total cost to the union including Branch expenditure represents over £1.1 million every year for just one 5 day event. In an organisation that is losing members and thus income, such an outlay is no longer justifiable every year.

4. Proposals for Change

As a consequence of the case for change, the NEC are proposing changes in three key areas.

Firstly, is a move to Biennial General and Industrial Conferences. We believe this will allow us the time to develop more strategic long term policies and to have them properly presented, discussed and decided upon at a Biennial Conference. We believe this will enable more consistent policy-making and provide the ability and time to focus on delivering such policies across the union particularly with a clearer focus for our Regions and Branches as laid out elsewhere in the Redesign Project. Crucially, it also supports the need for the union to achieve financial stability as set out above.

Secondly, in support of the requests made by Branches as part of the consultation exercise, we are proposing a more flexible approach to Policy Forums that will enable us to address contemporary issues that require a decision from Branches, or that warrant our Branches coming together to support our members at a time that is outside of the Biennial Conference cycle. This will be achieved by introducing clearer recommendations for Policy Forums, including lowering the threshold for Branches to be able to determine when these events take place.

Thirdly, in moving to Biennial Conferences we are proposing to provide the national leadership with the ability to place key strategies and policies by way of reports to Conferences. As part of this we will ensure Branches have the opportunity to shape these key strategies and policies not only by voting on them but also by proposing changes to them. Additionally, we will restructure Conference to ensure that the ability of Conference to debate and vote on motions, alongside the development of long term strategies, is maintained.

Through the approach outlined above, supplemented by high profile keynote speakers, we aim to ensure that a Biennial Conference is a more vibrant, dynamic and exciting showpiece event that benefits a modern trade union of the type the CWU Redesign Project sets out to achieve.

APPENDIX A – REDESIGNING CONFERENCES - RECOMMENDATIONS

The Move from Annual to Biennial Conferences

1. That the CWU should move to a system of Biennial General and Industrial Conferences from 2019.
2. That as part of the move to Biennial Conference, General Conference will be of a three day duration (including one day on equality) and Industrial Conferences will be of a three day duration.
3. That Conference be scheduled to mirror the term of office of the NEC.
4. That CWU move to Biennial Young Workers and Retired Members Conferences from 2019, whilst retaining an annual Young Workers National Education event.
5. That the move to Biennial Conferences be reviewed by the NEC following the 2021 Biennial Conference to consider whether there has been any adverse impact on decision-making, democracy and participation. For the 2023 Biennial Conference, a report will be produced for Branches setting out progress made, any concerns and any recommendations for further changes.

Format of General and Industrial Conferences

6. That we introduce a new format for Conferences which places the development of strategy and a more detailed and consistent policy at the heart of our debates, whilst retaining the clear and democratic role of Branches in setting the course of the CWU and of Conference as the sovereign body of the union. The new format would enable the NEC at General Conference and the Industrial Executives at Industrial Conferences to place strategy and policy documents before Conference whilst giving Branches the opportunity to amend these.

7. Branches, Regions, NEC, Industrial Executives, Young Workers Conference and Retired Members Conference as appropriate, will retain the ability to submit motions.
8. That where a matter requires a broader more open debate, we have the ability to build into Conferences a limited number of timed plenary sessions before moving to the formal policy position. This will enable an Executive member a time-limited opportunity to expand on an important subject and also give Branch delegates the opportunity to raise direct questions.

9. That as part of a new format, we explore the introduction of a mechanism that gives Branches the opportunity, following the publication of the agenda, to prioritise Branch motions in each section of the agenda. Further discussion will take place with the SOC on this aspect.

10. Further discussion will take place with the SOC on the best way to facilitate the new format of Conference as set out in recommendations 7, 8, 9 and 10.

Policy Forums

11. That as part of moving to Biennial General and Industrial Conferences, we strengthen the opportunity for the NEC, Industrial Executives and Branches to call for Policy Forums in between Conferences. This would take place in circumstances where a major contemporary issue has arisen that would require a decision of the union or where it is appropriate for a major issue to be the subject of a report that Branches can amend.

12. To facilitate recommendation 11, the NEC will produce for General Conference 2019 appropriate Rule changes on Policy Forums, including lowering the threshold for Branches to call these.

How we table and debate motions

13. That further work be undertaken in conjunction with the SOC to facilitate the following:-

- Review the deadlines for motions to be submitted to Conference with a view to introducing a window for submission rather than a deadline.

Who should be able to submit to Conference?

14. That the following bodies can submit motions to General Conference:-

- Branches
- The NEC and Industrial Executives (for Industrial Conferences only)
- Regions on issues relating to Political, Equality, Education, Learning and Training or Health and safety sections only.
- The Young Workers Conference will continue to be able to submit motions to General and Industrial Conferences and the Retired Members Conference will be able to submit motions to Conferences in accordance with the Rules.

15. To facilitate the above, further work will be undertaken in conjunction with the SOC on the number of motions and amendments that each body would be allowed to submit.

General Issues

16. The agenda should prioritise CWU business and the number of guest speakers should be restricted to one National or International high profile speaker per day of Conference, with a focus, where possible, on solidarity with other workers in struggle.
1. Introduction

The reason for this policy paper is that the NEC believes it’s time for a full review and union wide debate on the CWU’s approach to Education, Learning and Training.

The content of this policy paper explains the challenges that we face, sets out our objectives, our vision and proposes an inclusive process that will give us the time to produce a sustainable and affordable Education, Learning and Training programme for the future.

2. The Vision for CWU Education, Learning and Training

In line with our objectives under Rule, the CWU is committed to providing a unified and whole union approach to accessible, inclusive and relevant education, learning and training for our activists and members.

Specifically we provide education, learning and training for the following reasons:

• To underpin our industrial, organisational and political effectiveness by having informed, skilled and effective representatives at all levels and in all parts of the organisation.

• To promote trade union values and behaviours.

• To raise political consciousness and understanding of our core values and of the systems and conditions which impact on the lives of working class people.

• To provide and promote opportunities for our activists and members to fulfil their potential at work and in society.

• To support equality of opportunity and to remove barriers to participation in the union, politics and society in general for disadvantaged and under-represented groups.

3. Background

Our starting point is to recognise that a full discussion on what we are trying to achieve on Education, Learning and Training is very timely given the changes that may impact on our work in this area including:

• The need to redesign our offer to reps and activists and to ensure that this is inclusive and accessible.

• The need to ensure that our education, learning and training activity is geared towards the new world of work.

• The ongoing pressures on government funding, which has been decreasing for some years and on which we have some reliance.

• The impact of the asset review, and the broader changes under Redesign in terms of potential merged departments and in particular the need to plan for suitable alternative arrangements for activist training without owning our own residential education centre.

• The need to make our education, learning and training activity financially sustainable through addressing costs and avoiding duplication of effort.

The union has had a single integrated education, learning and training department since 2002. In that same year Conference adopted a very comprehensive policy which has underpinned our approach to education, learning and training ever since and which emphasised the value of integrated education, learning and training and the importance of accredited learning and residential training.

This model has served us well, and has supported an approach and vision that has seen us:-

• Develop an integrated programme that gives reps the skills, knowledge and confidence to deliver in the workplace.

• Deliver education, learning and training via residential and Regional courses to circa 2,000 representatives each year.

• Deliver learning opportunities to circa 6,000 of our members each year.

• Develop a strong and self-sustaining network of Branch based Union Learning Reps and Learning Centres and a Regional structure to support CWU Learning.
• Developed our own online learning platform at a fraction of the cost of a commercial set up which now has over 3,500 learners and has steady month on month growth in members and reps accessing blended, online and “bite size” courses.

• The department oversees the union’s mentoring programme, the scholarship fund to support degree level study and works with a number of partner organisations and colleges to promote, deliver and develop learning opportunities for our activists.

The programme we offer to Branches is valued and well supported by many (but not all) Branches and activists. However, there is not a great deal of consistency in approach to organising and supporting representatives training from either Regions or Branches, which means that at one end of the scale there are Branches who systematically provide and engage with training and open up opportunities to all representatives and at the other there are Branches who train very few or no representatives.

We have based much of our past strategy on building based education, learning and training from Alvescot Lodge and before that the Elstead Hotel. Residential courses are viewed as positive in terms of creating a single union identity with reps attending courses with people from all parts of the union. However, not all Branches are able to access courses there for reasons of geography, cost and culture. So, although residential training is consistently ranked as an important part of what we do, around 60% of our estimated 2,500 reps would not attend residential courses as more now access learning via a combination of Regional and online learning. Clearly, more data will be required to illustrate the trends and patterns of course attendance as the debate develops.

The asset review presents us with an opportunity to plan an education programme, which includes residential training courses delivered away from a directly owned residential centre that we have now.

We use a variety of mostly CWU or employer sites for Regional courses (which can be a considerable financial saving to the union), and some of these sites are better equipped than others in terms of availability of IT and broadband, space, accessibility and resources. Many Branches deploy ULRs to assist with the organisation of learning and this creates good practice in terms of numbers trained and the support offered to learners.

4. The Factors Driving a Change in Approach

• Funding and resources
• The impact of the Asset Review
• The forecast and the current changes and shifts in the world of work
• The new and developing political landscape
• Digitalisation

5. Our Objectives

• To identify and agree across the whole CWU what skills, knowledge, support and values we need to develop in our activist base to support our industrial, organising and political activity now and into the future.

• To develop suitable residential, Regional and online programmes, pathways and support tools for representatives to maximise participation and access to education and development.

• To ensure that all our programmes are flexible enough to be inclusive, accessible and of a consistent quality regardless of where or how they are delivered.

• To continue to develop and train trade union tutors to support and deliver trade union education, learning and training.

• To deliver and promote inclusive learning opportunities for our members through local learning centres, supported and promoted by trained ULRs.

• To expand and develop our successful CWU digital skills platform to ensure that we are providing cutting edge support and learning to members and reps.

• To work across the three pillars to ensure that we have a consistent one union approach to developing representatives.

• To provide opportunities for trade union specific continuing professional development to staff, NEC members, Regional Secretaries and Officers of the CWU.

• To develop strategic partnerships with organisations in politics, education and the community that share our aims and values to provide specialist educational opportunities within the CWU.
• Branches will also have the option to use Senior Branch/Field Officials to deliver training, subject to passing a level of competency to do so.

• Where practically possible, the Education, Learning and Training department will provide bespoke training programmes, including Industrial Training, upon request.

6. A Future Education, Learning and Training Policy

Future policy will need to address the following:-

• Union wide agreement on skills needs for reps and activists and a clear pathway for every rep to follow in terms of their development.

• Programmes that reach all parts of the union through the correct balance of residential, regional, online and informal courses.

• The resources required to deliver programmes from the General Fund, from Branches and from external sources.

• How the Industrial constituencies will provide ongoing input into developing learning and skills strategy.

• How we clearly link and encourage education, learning and training activity at Branch level to follow and support the fourteen measures of success for Branches as set out in the Branch Consultation.

• Consistent understanding, support and approaches to ULRs and Learning activity across the whole union.

• Strong links to our political strategy and the development of bespoke political education for reps.

• A new “CWU Reps’ Package” that will include ongoing training and development.

7. Next Steps

In order to move this debate forward we are focusing on the following next steps:-

• The need to develop a whole union approach to identifying our education, learning and training needs for the future.

• The urgent need to prepare for the impact of the Asset Review.

Next Steps - Developing a Whole Union Education, Learning and Training Strategy for the CWU

The key objective will be to develop a clear unified strategy position for the whole union on how we develop, deliver and resource education, learning and training for our representatives and members that supports the CWU’s core policies and strategies and is flexible, affordable, accessible and relevant.

Additionally, any future policy must address the very real challenges faced by the union in regards to the potential for diminishing or insecure funding for either Learning Projects and for activist training through colleges, any weakening of employer release agreements, the changing nature of our representative structures and the need to improve and expand digital learning.

Scoping Group

A Scoping Group will be set up to develop a comprehensive Education, Learning and Training Strategy which will include representation from four representatives from the NEC (two from each industrial constituency), the Education, Learning and Training Department, a Regional Secretary and the General Secretary’s department. This group will report to the NEC and be charged with setting out a new comprehensive policy building on the themes in this document and the following specific factors as follows:

• How can the CWU activist education programme best support the organisational, political and industrial objectives of the CWU now and into the future?

• What skills and knowledge do our representatives need and how does this vary across different parts of the union? And how can we ensure that we can systematically identify and respond to new and ongoing training needs?

• How do we ensure that Branches have consistent approaches to education, learning and training?

• How can CWU learning reps support our organisational, political and industrial work?

• What methods of delivery should the union deploy? (E.g. regional training, residential training, online, distance learning etc.)

• One size fits all does not always work. So, what specialist programmes are required for specific groups and how can we ensure that we avoid unnecessary duplication and ensure best use of resources?
• What resources do we have and what do we need to support this work?

• How can we best develop our political education?

• How can the education team work more collaboratively and in a more “joined-up” way with other departments?

• What is required to ensure we comply with relevant legislation (Employment Act) regarding delivery of trade union education, learning and training to reps?

• How does any future strategy maintain and enhance course release agreements with our employers?

• How does any future strategy ensure a consistent approach across the CWU, pan UK and Crown Dependency given the differences in devolved budgets and Codes of Practice?

The output of this group will be to produce a comprehensive draft policy document to underpin and guide all our training, learning and education activity into the future. This document will form the basis, subject to NEC approval, of a submission to General Conference in 2019.

Next Steps – Impact of the Asset Review

The NEC is committed to providing a proportion of our activist education, learning and training programme residentially along with further developing our Regional and online provision. Providing such Education, Learning and Training without our own residential education centre means that there are a number of short and medium term practical measures that will have to be scoped and adopted to ensure that we are able to continue to run a programme and to provide residential courses for representatives where it is the best option for delivery of that course or where it makes better practical sense.

Such planning should ensure that we are prepared to make whatever adequate transitional contingency arrangements that are necessary to deliver residential courses should, as we believe, the closure of Alvescot Lodge materialises. These plans will be in place and ready at the start of 2019. In addition, we will carry out the following actions:-

1. That we provide a report to the NEC which maps in detail the attendance of reps on all courses by Branch, Region, type of course and equality monitoring.

2. That we identify the courses, delivered under the current residential programme, which is scheduled until 31 July 2019 that will be impacted by the closure of Alvescot Lodge and that will require residential delivery.

3. That we establish the availability and resource implications of the following options for delivery of some or all of our residential courses in the immediate event of the closure of Alvescot Lodge.

   • The Elstead Hotel
   • CWU HQ training room plus hotel
   • CWU Regional Office training room plus hotel
   • A union owned or run education facility that we may be able to book.

4. That we audit the various CWU Regional or Branch locations where we currently deliver courses with a view to identifying between 10 to 15 locations which have the facilities and capacity required to deliver a higher number of courses in the future and that we identify any improvements or adaptations that may be required at these locations.

5. That we identify the administrative functions and roles required to deliver a programme in the event of the closure of Alvescot Lodge.

APPENDIX A – EDUCATION, LEARNING AND TRAINING - RECOMMENDATIONS


2. That the next steps proposal to bring forward a detailed whole union strategy for Education, Learning and Training in the CWU to General Conference 2019 be endorsed.

3. That the next steps of the NEC in relation to planning for practical contingency arrangements in the event of the sale of Alvescot Lodge be endorsed.
SECTION 7 NEC ENABLING MOTIONS

SPECIAL REDESIGN CONFERENCE ENABLING MOTION – BRANCHES

Conference notes the terms of the NEC recommendations contained within the Redesign CWU Branches document together with the motions that have been carried by this Special General Conference. Conference agrees that taken together these now form CWU policy on Redesign for Branches.

Conference therefore instructs the NEC to bring forward to a Special Rules Revision Conference any Rule amendments that are necessary to enact CWU policy on Redesign for Branches. Conference also instructs the NEC to immediately act on CWU policy on Redesign for Branches which does not require Rule amendments.

SPECIAL REDESIGN CONFERENCE ENABLING MOTION – REGIONS

Conference notes the terms of the NEC recommendations contained within the Redesign CWU Regions document together with the motions that have been carried by this Special General Conference. Conference agrees that taken together these now form CWU policy on Redesign for Regions.

Conference therefore instructs the NEC to bring forward to a Special Rules Revision Conference any Rule amendments that are necessary to enact the CWU policy on Redesign for Regions. Conference also instructs the NEC to immediately act on CWU policy on Redesign for Regions which does not require Rule amendments.

SPECIAL REDESIGN CONFERENCE ENABLING MOTION – EQUALITY

Conference notes the terms of the NEC Recommendations contained within the Redesign CWU Equality document together with the motions that have been carried by this Special General Conference. Conference agrees that taken together these now form CWU policy on Redesign for Equality.

Conference therefore instructs the NEC to bring forward to a Special Rules Revision Conference any Rule amendments that are necessary to enact the CWU policy on Redesign for Equality. Conference also instructs the NEC to immediately act on CWU policy on Redesign for Equality which does not require Rule amendments.

SPECIAL REDESIGN CONFERENCE ENABLING MOTION – NATIONAL STRUCTURES

Conference notes the terms of the NEC recommendations contained within the Redesign CWU National Structures document together with the motions that have been carried by this Special General Conference. Conference agrees that taken together these now form CWU policy on Redesign for National Structures.

Conference therefore instructs the NEC to bring forward to a Special Rules Revision Conference any Rule amendments that are necessary to enact the CWU policy on Redesign for National Structures. Conference also instructs the NEC to immediately act on CWU policy on Redesign for National Structures, which does not require Rule amendments.

SPECIAL REDESIGN CONFERENCE ENABLING MOTION – CONFERENCES

Conference notes the terms of the NEC recommendations contained within the Redesign CWU Conferences document together with the motions that have been carried by this Special General Conference. Conference agrees that taken together these now form CWU policy on Redesign for Conferences.

Conference therefore instructs the NEC to bring forward to a Special Rules Revision Conference any Rule amendments that are necessary to enact the CWU policy on Redesign for Conferences. Conference also instructs the NEC to immediately act on CWU policy on Redesign for Conferences which does not require Rule amendments.

SPECIAL REDESIGN CONFERENCE ENABLING MOTION – EDUCATION, LEARNING AND TRAINING

Conference notes the terms of the NEC recommendations contained within the Redesign CWU Education, Learning and Training document together with the motions that have been carried by this Special General Conference. Conference agrees that taken together these now form CWU policy on Redesign for Education, Learning and Training.

Conference therefore instructs the NEC to bring forward to a Special Rules Revision Conference any Rule amendments that are necessary to enact the CWU policy on Redesign for Education, Learning and Training. Conference also instructs the NEC to immediately act on CWU policy on Redesign for Education, Learning and Training which does not require Rule amendments.
SPECIAL REDESIGN CONFERENCE
DELIVERING A CONNECTED UNION THAT EXCELS IN AND OUT OF THE WORKPLACE