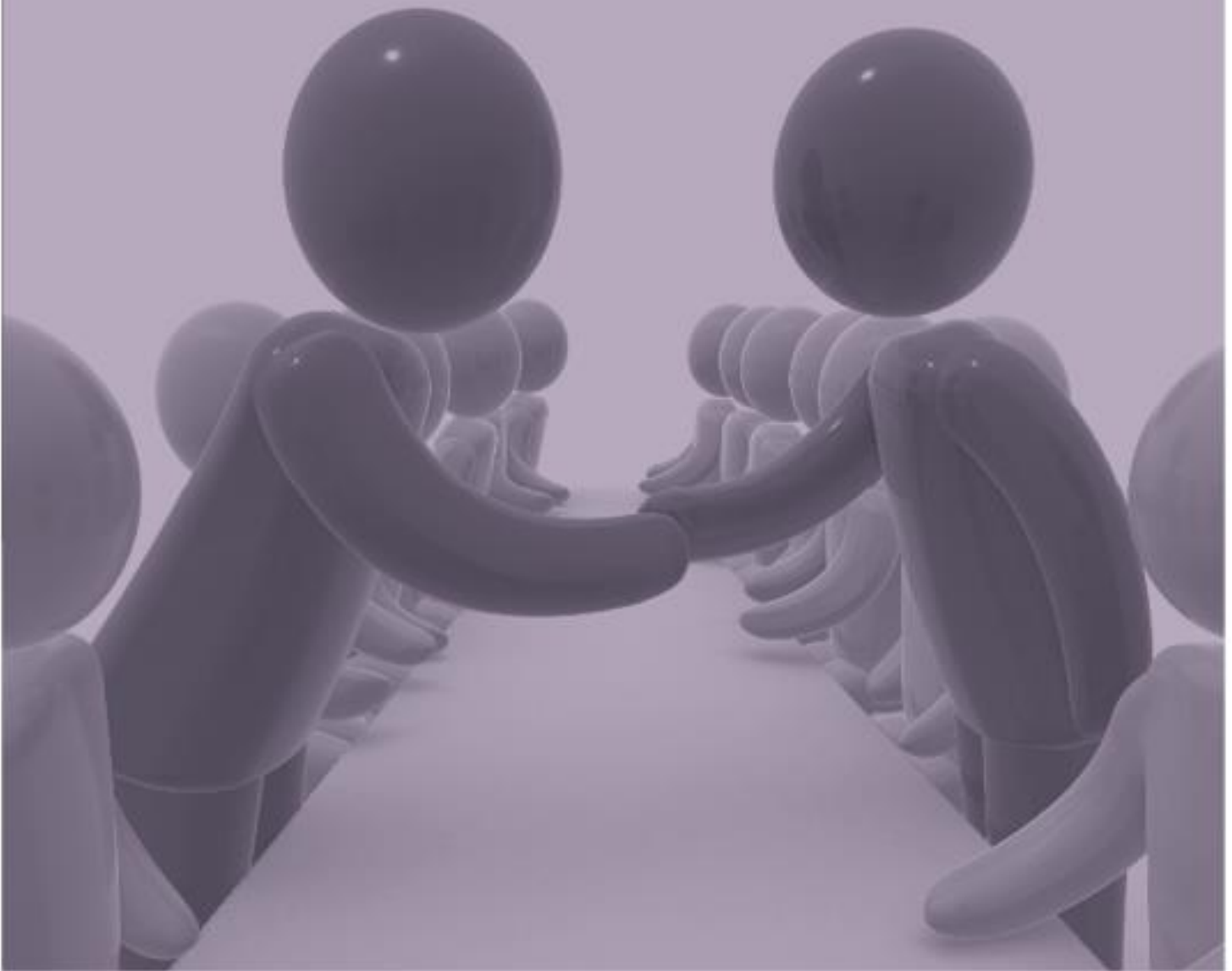


BARGAINING FOR INSOURCING



Bargaining Support Group

Introduction

Decades of relentless outsourcing has seen hundreds of thousands of staff transfer from employment by local councils, NHS trusts, police authorities, universities, colleges, schools and utility services to external providers, such as private companies or charities. From school catering to social care, cleaning to IT and HR services, almost no area of public services has been left untouched.

But high-profile scandals exposing the extraction of public money to shareholders and damage to the quality of service provision, which were amplified during the period of the Covid-19 pandemic, has seen policy makers begin to rethink the benefits of a directly employed workforce delivering public services.

As illusions about the supposed benefits of outsourcing have been eroded by the reality of contracting services out¹, there has been a notable turn over recent years toward “insourcing” - the process by which a public authority² takes a service that has been contracted out and brings the service “in-house” to be delivered by directly employed staff.

Usually, outsourcing is accompanied by a deterioration in the pay, pensions, terms and conditions of the staff delivering the service, creating a “two-tier” workforce of directly employed staff working alongside contractor staff, as well as a “two-tier” workforce within the contractor. TUPE legislation can offer some limited protection for staff transferred to an outsourced contract, but staff recruited by the contractor after transfer have no such protection. These inferior conditions can translate into lower costs for contractors, which plays a crucial role in offering a cheaper tender and winning contracts.

[UNISON's procurement bargaining guide](#) outlines all the current legislation governing the procurement process and advises on measures to block the outsourcing of contracts. However, this guide seeks to offer branches advice on how they deal with contracts once they have been outsourced, with the aim of maximising the chances of returning them in-house.

The guide takes branches through the stages of UNISON's Five Phases to Win campaign planning as applied to insourcing:

- Phase 1 - Research and campaign development
- Phase 2 – Base building
- Phase 3 – Insourcing campaign launch and escalate
- Phase 4 – Win insourcing or create crisis (for the employer / decision maker!)
- Phase 5 – Win, celebrate, review and sustain

¹ APSE, Rebuilding Capacity, May 2019 - [https://www.apse.org.uk/sites/apse/assets/File/Insourcing%20\(web\).pdf](https://www.apse.org.uk/sites/apse/assets/File/Insourcing%20(web).pdf)

² For the purpose of this guide, all references to public authorities are intended as a broad category of commissioning bodies engaged in the delivery of public services and therefore such references are intended to cover councils, NHS trusts, schools, academies, universities, further education colleges, police authorities, energy and water companies.

It then builds on this outline with more detail on three key areas that run through the five phases:

- Establishing a clear picture of outsourced contracts;
- Building union strength in the contractor and mobilising the workforce behind the campaign;
- Assembling a clear set of arguments and targeting them on the full range of possible allies – service users, local communities, media, local political figures, scrutiny committees and public authority management.

At each step, the guide seeks to provide templates that can be used in building a comprehensive plan.

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The five-phase campaign plan

Phase 1 - Research and campaign development

1.1 Identify insourcing target

- Establish a clear picture of outsourced contracts including scale, relevant contract dates, and terms and conditions of employment etc – using the templates provided.
- Identify the decision makers for each of the contract and conduct a “power map” of them. Ultimately who can take the decision to insource? Who and what are their motivations, self-interest and influencers and how do we exert influence? Who are our potential campaign allies inside and outside of the workplace and how can they be mobilised?
- Map current and potential union strengths and weaknesses within each of the contracts and any other areas that could exert pressure on the decision maker.
- Assess collective workplace issues that could be used within an insourcing campaign – are they widely and deeply felt? Can insourcing provide the union solution to the issue?
- Identify potential opportunities to grow membership, increase member participation and identify and develop activists.
- Aggregate the information to select a target where the campaign is winnable within available time and resource, and which also provides opportunity to increase membership levels, participation and activism.

1.2 Establish a campaign team or organising committee

- It is recommended the team or committee include active and respected leaders from the workforce as well as officers of the branch and regional staff.

1.3 Campaign goal and objectives

- As well as achieving insourcing, a campaign should also aim to build a stronger and powerful union. SMART organising targets should be set for membership recruitment / growth and new activists.
- Baseline levels of membership and activism should be recorded so that organising success can be measured as the campaign progresses.

1.4 Develop a timeline and resourced plan to take the campaign through the following phases 2-5.

Research and Campaign Development			
Objective	Task	Responsibility	Deadline

Phase 2 – Base building

2.1 Building the workplace and community union base from which the insourcing campaign can be confidently launched.

- Launch pre-campaign organising activity to identify / confirm organising issues and increase membership and activism. This phase could include workplace visits and meetings to agitate around the collective issues that could be resolved through insourcing.
- Initiate / develop relationships with potential community and political campaign allies outside of the workplace.

2.2 Finalise the “plan to win” - a clear, coherent and credible strategy for phases 3 and 4 – to build the power and exert the influence over the decision maker to move them to insource.

Base Building Organising Activity			
Objective	Task	Responsibility	Deadline

Phase 3 – Insourcing campaign launch and escalate

3.1 Launch the campaign from a position of confidence and strength

- The plan to win should be clear, credible and have the confidence of the membership. It must be developed in a way that requires member participation for success which will in turn enable ongoing activist identification and development.
- Membership should increase significantly with the goal of majority density.
- Insourcing campaigns will require public facing activity, external to the workplace, to “leverage” decision makers through well targeted multi directional pressure. It is vital that members understand and have confidence in the “plan to win”.

Issue Campaign/s Launch & Escalate			
Objective	Task	Responsibility	Deadline

Phase 4 – Win insourcing or Create Crisis (for the employer / decision maker!)

4.1 Escalate the campaign inside and outside of the workplace and bring multiple pressures to bear simultaneously until they create a crisis for the decision maker which exceeds any costs of insourcing (financial, political or ideological).

- Success will require a plan of escalating action – to test and build the participation and resolve of members whilst incrementally increasing pressure on the employer / decision maker.
- Actions start as relatively “soft” opportunities to participate and demonstrate strength of feeling such as petitions or collective grievances, before moving to more open displays such as badge and sticker days. The campaign can then build towards collective activity such as meetings and rallies.
- Community and political events can be held outside of the workplace and the campaign can be taken to other interested individuals / bodies and influencers of the primary decision maker.
- Ultimately the campaign can escalate to formal ballot for industrial action (with advice to ensure a lawful dispute focused on workplace issues)

Create Crisis			
Objective	Task	Responsibility	Deadline

Phase 5 – Win, celebrate, review and sustain

5.1 Win the campaign, promote and celebrate the win and ensure sustainability of membership, organisation, activism, participation and confidence.

- A full and thorough review of key lessons and future recommendations must be captured to inform future UNISON organising strategy.
- Follow through and continue to work with the members to ensure that the insourcing is delivered and that any problems are addressed.

Phase 5 – Win, Celebrate, Review & Sustain			
Objective	Task	Responsibility	Deadline

Establishing a clear picture of outsourced contracts

The information needed

The first task in developing a comprehensive plan for insourcing is to gain a clear picture of the services that are currently contracted out by the employers that the branch deals with.

Ideally, the aim would be to draw up a table along the lines of that below.

Template for listing outsourced contracts – basic information

Public authority				
Contracted service	Provider	Contract end date	Terms of early termination	Number of staff / union members

Template for listing outsourced contracts – additional useful information

Public authority				
Contracted service	Original tender date	Retenders and change of contractor	Are terms linked to national bargaining	Are terms different for transferred staff and new starters

Contract end date - Some contracts may have a clear end date. Others may be complicated by an option to extend, so for instance they are set for three years, but with an option to extend for two years. This would normally mean that after three years the contract would not have to go through a formal retender, but would allow the employer to extend the contract if they judge that performance of the contract has been satisfactory. However, this break in the contract should still be noted as it may offer an opportunity to challenge extension.

Early termination - It may also be useful to determine the terms under which the contract can be terminated ahead of the due end date, both in terms of the timescale for notification and any agreed financial penalty it may entail.

Number of staff / members – The total number of staff employed on a contract, the number who are UNISON members and the number who are members of another union are all useful pieces of information to know for making decisions about priorities for targeting insourcing campaigns.

Original tender date – Knowing when the contract was originally transferred to an external provider can be helpful to understanding the likely split between transferred staff and staff who have only ever experienced working for the contractor, along with the likely ease of a public authority’s capacity to absorb the service in-house.

Retenders and change of contractor – The number of times a contractor has won the retender of a service or staff have been transferred to a different contractor can help in gaining a feel for the likely chances of winning an in-house tender and the complexity of changes in terms experienced by staff.

Are terms linked to national bargaining – Agreements on staff transfer may have established that the contractor will continue to comply with national agreements, such as local authority NJC / SJC or NHS Agenda for Change pay increases. The more detached contractor staff are from national agreements, the greater the likely benefits of returning in-house.

Are terms different for transferred staff and new starters – The extent to which a “two-tier” workforce (i.e. a workforce split into staff on differing terms and conditions) has emerged will be linked to establishing whether staff who started employment after contract transfer are employed on the same or similar terms to staff who were transferred across from the public authority. It can also be useful to find out which pension scheme is provided for contractor employees as very often contractors provide inferior pension schemes.

Place of work and shift patterns – Map out the workplaces that the contractor covers and the times that staff are working. This is especially important to know when organising members who work on shifts (e.g. cleaners, caterers, security, porters etc). This will help the branch to work out how and where to meet with and talk to the workers.

How to find the information

Finding this information can involve drawing on publicly available sources:

- Some public authorities publish a Contract Register, which can be accessed through an internet search. This will typically provide a spreadsheet showing all the services the authority buys in, together with some basic details of the contract duration and value.

By way of example, this is the Contract Register maintained by Greenwich Council https://www.royalgreenwich.gov.uk/info/200209/how_to_do_business_with_the_council/300/contracts_register

It may be possible to request this from the commissioning body via your local negotiating bodies (JCC / JNC) and / or have commissioned contracts made a standard agenda item for meetings.

- High value contracts awarded by public authorities (worth in excess of around £118,000) are published on Find a Tender - <https://www.gov.uk/find-tender>. The history of awarded contracts goes back to 2021, when the Official Journal of the European Union ceased to be the vehicle for publishing such contracts.
- Lower value contracts awarded by public authorities (worth in excess of around £10,000) are published on Contract Finder - <https://www.gov.uk/contracts-finder> [in the case of authorities whose functions are devolved or mainly devolved functions of Scotland, Wales or Northern Ireland, separate national databases of public sector contracts are maintained through [eSourcing NI](#), [Public Contracts Scotland](#) and [Sell2Wales](#)]
- Prior to the UK's exit from the European Union, contract awards were published on the Official Journal of the European Union site - <https://ted.europa.eu/TED/search/search.do>. Therefore, contracts agreed prior to exit may still show on the site (the transition period for exit from the European Union ended on 31 December 2020).

Find a Tender, Contract Finder and the Official Journal of the European Union can all be searched by the name of a public authority to display all contracts awarded by the authority. If you need assistance in searching any of these sources, contact the Bargaining Support Group via bsg@unison.co.uk

If the publicly available sources do not provide the information you are seeking, a request to the employer may offer the most practical alternative route.

Usually, the primary reference to justify demands for information on bargaining matters where a union is recognised is the [ACAS Code of Practice on Disclosure of Bargaining Information](#) or its [LRA equivalent](#) in Northern Ireland. But the nature of the information sought on contracted out services may make it easier to obtain the required data from a public sector organisation through the Freedom of Information Act 2000.

UNISON's full guidance on making such a request is available at <https://www.unison.org.uk/content/uploads/2016/08/Guide-to-using-the-Freedom-of-Information-Act.pdf>. However, a template for such a request is set out on the next page.

Model letter seeking contract information from a public authority



[Branch name and address]

[Public authority name and address]

[Date]

Dear Fol Officer,

This is a request under the Freedom of Information Act.

Could you please supply me with the following information:

- A list of all services that are currently contracted out by the authority to an external provider³;
- The name of the provider for each contract;
- The end date of each contract;
- Details of whether each contract carries an option to extend the duration of the contract;
- The terms for early termination of each contract;
- The number of staff employed on each contract.

Could you please forward this information by email to [branch email address] or by post to [branch address]

I look forward to hearing from you within the 20 working days set out by Freedom of Information legislation.

If I can help to clarify this request, please telephone me on [branch phone number] or contact me by email at [branch email address].

Yours sincerely

[Your name]

[Your branch official position]

³ For clarity, our Fol request is seeking information on those areas where external providers are engaged in the ongoing delivery of the authority's services. Typical examples would include facilities management (such as catering, cleaning, security and building maintenance) and back office functions (such as administration and payroll). It would not cover such areas as the supply of goods, short term consultancy, or one off construction / IT installation work.

Data on the number of staff working on the contract may be among the most difficult to obtain. It may be that a public authority does not hold figures and therefore would not have to provide the information under an FoI request.

Similarly, as a contractor would not generally be a public sector body, it would not have to provide the information under Freedom of Information legislation. However, a contractor may prove co-operative to such a request in some cases.

In a few cases, a specific company subsidiary may handle a contract and therefore staff numbers show in the company's annual accounts. To check if this is the case, contact Bargaining Support via bsg@unison.co.uk.

How to use the information

Once a clear picture of outsourced contracts and their terms has been established, the information can be used to decide priorities for insourcing efforts and determining the timetable of activities to achieve insourcing.

In determining the contract(s) to target, these factors are liable to be important to decision making:

- Density of union membership and number of activists;
- Potential for building density of union membership;
- Scale of discontent among staff;
- Potential for mobilising wider support among service users, local community groups, the media, political bodies / figures, other unions representing staff in the contractor or managerial staff;
- Time available to build a campaign before a contract is due for renewal. Research conducted by The Association for Public Service Excellence (APSE) suggests that an ideal lead-in time of two years is necessary to adequately plan to insource services, though longer may be required where extensive building of union organisation is needed;
- Whether success in insourcing a flagship contract will have a knock-on effect for increasing the chances of bringing others in-house.

The assessment of information collected on contracted out services and deciding the contracts for targeting can be a useful point at which to establish a campaign team, involving both suitable union officials and regional staff.

This campaign team can then form the focal point for assembling an insourcing plan and taking forward the actions identified, with regular meetings over the lifetime of the campaign.

Regional officers involved in the campaign will be able to escalate issues as required to national officers, drawing in the assistance of such sections of the union as the relevant service group, Private Contractors Unit and Bargaining Support Group.

Building union strength in the contractor and mobilising the workforce behind the campaign

The contractor workforce in any service identified as a target for insourcing is clearly going to be a key pillar of any successful campaign.

Therefore, the table below offers an adjustable model for sketching out the work to be done in building union strength through member recruitment and activist development, establishing a dialogue with the workforce and going on to organise campaign activities.

Workforce campaign plan template

	UNISON activists	UNISON members	Non-UNISON union members	Non-union members	Whole workforce
Recruitment					
Activist development					
Gathering views					
Providing information					
Campaign activities					

Recruitment

The initial assessment work may have revealed the membership density UNISON and other unions hold within the contractor workforce. However, the strength of the union's position against the employer is always a critical factor in the likely success of any campaign. Therefore, the branch may target a certain density level that it believes is necessary before it can take forward an insourcing campaign successfully.

To achieve the density target, a timetable of recruitment work should be assembled, that may include the following dimensions:

Recruitment activity template

Activities	Specific actions / timetable
<ul style="list-style-type: none">• Holding a series of recruitment events	
<ul style="list-style-type: none">• Establishing a stock of recruitment materials	
<ul style="list-style-type: none">• Display of recruitment materials	
<ul style="list-style-type: none">• Distribution of recruitment materials	
<ul style="list-style-type: none">• Holding informal discussions with non-members	

Remember, don't expect potential members to come to you, plan out how, where and when you can meet the workers to maximise engagement. Make time to listen to their current issues and to talk about how the union can work with them to bring about positive change at work. Consider whether more informal activities will create opportunities for recruitment and celebrate any successes to build trust and show how the union makes a difference.

One of the ways in which contracting out has sometimes led to major membership loss has been through the dropping of DOCAS arrangements for payment of union subscriptions. Therefore, the importance of ensuring that DOCAS agreements with employers, including contractors, are in place, and stay in place, should not be underestimated. The [UNISON procurement guide](#)⁴ offers more details on the issue.

⁴ <https://www.unison.org.uk/content/uploads/2021/02/Bargaining-on-procurement-and-TUPE-0522.pdf>

Activist development

Whether there are official union reps among a contractor will depend on whether the union is recognised by the contractor. Under TUPE, recognition should have transferred at the time that the service was originally contracted out, but the employer may have subsequently moved to derecognise the union if arrangement was voluntary. Where recognised union representatives are in place, the structure should offer a strong basis to work from.

[UNISON's facility time guide](#)⁵ offers important advice on ensuring an agreement with the employer includes provision for a sufficient number of reps and for those reps to have adequate entitlement to time off.

However, even where recognition is in place, activism may be low within contractors. Therefore, a timetable of development work should be assembled, that may include the following dimensions.

Activist development activity template

Activities	Specific actions / timetable
<ul style="list-style-type: none">• Holding informal discussions with members to encourage them to stand as general union reps, as well as fulfilling the specialist roles of health and safety reps or union learning reps.	
<ul style="list-style-type: none">• Where members are reluctant to take on an official branch position, it may be valuable to encourage them to become a “workplace contact” who arranges meetings, transmits info to members, and communicates the views of members to stewards. Workplace contacts have no statutory right to facility time, but there is nothing to stop a branch seeking an agreement to allow contacts reasonable time off.	
<ul style="list-style-type: none">• Ensuring all activists receive the full training to which they are entitled for discharging any official union position.	
<ul style="list-style-type: none">• Supporting all new reps or contacts through a buddy or mentor, using the trained-and-active approach set out at www.unison.org.uk/get-involved/in-your-workplace/mentor-buddy/	

⁵ https://www.unison.org.uk/24744_facilitytimeguidance/

Where, despite all efforts, the number of activists within the contractor remains chronically low, it may be necessary for branches to consider the option of funding a part of their representatives' time or obtaining further support by pursuing the options below.

Funding options

Section C of the Branch Funding Formula

Branches facing short term financial problems or continuing exceptional needs can seek assistance and request special funding under Section C of UNISON's Branch Funding Formula. It would be beneficial in such circumstances for a branch to work closely with their region to draw up a plan.

For more information, branches should speak to their regional organiser who will then contact the finance department at the UNISON Centre.

Organising Framework

Since 2020 there has been a question on facility time changes in the annual Organising Framework document completed every autumn by a branch and their regional organiser.

This procedure offers a point at which a branch can discuss with regional staff their access to (or lack of) facility time and what options there might be available to approach an employer for improved arrangements, taking on branch employed staff (BES) or bids to the Branch Support and Organising Fund

Branch Support and Organising Fund

From 1 January 2022, the new Branch Support and Organising Fund (BSOF) has replaced both the Regional Pool and Fighting Fund. This new fund will receive 2% of national subscription income every year and be apportioned to regions to distribute to branches and any regional Self Organised Groups that bid.

The fund aims to bring together the best of the Regional Pool and Fighting Fund and is focused on building branch capacity. These initiatives may be identified as part of the annual Organising Framework process.

The fund can be used for recruitment materials, physical goods such as upgrades to the facilities in the Branch Office and UNISON staffing resources. A guidance document and application form for the fund has now been developed - [The new Branch Support and Organising Fund | UNISON National](#)⁶

The approval of bids and general management of the projects is overseen by an appropriate regional lay body. Payments are made from National Office once the region has approved the bid.

⁶ <https://www.unison.org.uk/the-new-branch-support-and-organising-fund/>

Branches, or groups of branches, can bid for staff to work on dedicated recruitment and organising projects in areas where there is an identified need through the Organising Framework and regional planning processes. This could also include, for example, bidding to trial a case worker for outsourced members to let the branch assess long term viability.

Bidding bodies may be expected to make a suitable financial contribution to the fund in order to sustain the fund and enable other bodies in the region to benefit from this resource in the future.

For further information and assistance in putting forward a bid to the Branch Support and Organising Fund, please contact your regional organiser.

Where dealing with a contractor that does not recognise the union, a recognition campaign may offer the ideal point from which to start, since recognition will usually involve a recruitment drive and an activist development programme. Recognition can then act as the basis from which it is possible to forge the insourcing campaign.

UNISON's bargaining guidance on achieving recognition is on this link.

<https://www.unison.org.uk/recognition-agreements-guide-03-2019/>

Gathering views

Getting to understand the views of the staff who work for the contractor is a crucial early step in shaping campaign work.

It is easy to make assumptions about the views or knowledge of staff working for the contractor. For instance, many contractor staff may have no experience of ever having worked for the public authority that commissions the contractor and may have built up a loyalty / attachment to their employer. They may not realise the benefits of working directly for the public authority or commissioning body. Therefore, their sympathies for seeing the service transfer to direct provision by the public authority may initially be quite limited.

Taking the time to gather staff together and listen to their views about working for the contractor can help avoid falling into that trap, while uncovering their key grievances provides solid ground for recruitment work and offers strong pointers for the kind of issues that will rally staff support behind insourcing.

Template for gathering staff views

Activities	Specific actions / timetable
<ul style="list-style-type: none">• Formal meetings with UNISON members / all staff	
<ul style="list-style-type: none">• Informal meetings with individual members / wider workforce	
<ul style="list-style-type: none">• Survey of members / all staff (a model survey is set in Appendix 2 of this guide)	
<ul style="list-style-type: none">• Request for feedback through UNISON communications	

Providing information

Among contracted out staff, the blatant injustice of terms and conditions that are inferior to those of staff employed directly by the public authority is likely to form a central grievance. There are numerous examples of where the anger of staff who earn rates of pay well below national pay scales (such as local authority NJC / SJC or NHS Agenda for Change rates), has been the primary driver in industrial disputes that have played a large role in an employer's decision to bring services in-house.

It will be useful to draw up a table that contrasts the different terms and conditions so that staff can clearly understand the differences. This will help to emphasise what the workforce has to gain from insourcing.

Template comparing staff terms and conditions

	Staff employed by contractor	Comparable staff directly employed by the public authority
Pay rates		
Pay increases		
Unsocial hours payments		
Hours		
Leave		
Sick pay		
Pension scheme		
Other terms (e.g. maternity/paternity/parental leave, rest breaks)		

Staff who were transferred to a contractor under TUPE may not have seen such an erosion of terms and conditions as staff who have been taken on by the contractor since the transfer took place. Therefore, the longer a contract has been run by a contractor, the wider these differentials are liable to become. This is often referred to as a “two tier workforce.”

Campaigning around terms and conditions, to bring them in line with directly employed staff or improvements such as payment of the Living Wage, have been crucial to many campaigns in persuading a contractor to decide against seeking to continue with the contract. This decision can be prompted by reduced profitability of the contract or concerns about the resources drawn into continual employment relations issues and reputational damage. The commissioning body may also realise that it is no longer cost effective to outsource the service.

Alongside the contrast in terms and conditions, the financial results of the contractor can provide staff with further insight into the injustice of their position.

- The latest accounts of private companies can be obtained through Companies House at <https://find-and-update.company-information.service.gov.uk/>
- The latest accounts of charities can be obtained through the Charity Register at <https://www.gov.uk/find-charity-information>
- The latest accounts of housing associations can be obtained through the Mutuels Register at <https://mutuals.fca.org.uk/>

However, for any assistance in interpreting accounts, contact the Bargaining Support Group at bsg@unison.co.uk

The type of information that can be gleaned from accounts is as follows:

- Scale of profits made by the contractor;
- Level of dividends handed out to shareholders by the contractor;
- The contrast between staff costs and profits;
- Remuneration of the chief executive officer.

Campaign activities

After all the groundwork has been done amongst the contractor workforce in building membership, encouraging members to get involved as activists, identifying the grievances of staff and helping staff understand the injustice of their treatment when compared to directly employed staff, the campaign will eventually move on to identify a timetable of events for taking forward the insourcing campaign itself.

It will be important for the whole of the branch to know about the campaign and to be actively involved in the campaign to bring the service in-house. All of the activists and members who are employed directly by the public authority/commissioning body will have a part of play in the activities that form part of the campaign plan.

The template below is a suggested set of activities, which have been deployed as part of many successful insourcing campaigns. It should be integrated with the next section of the guide considering how key allies can be brought in to strengthen the campaign.

Template plan for campaigning activities

Activities	Specific actions / timetable
Demonstration / march / rally [Often held outside an important public authority building to maximise attention on the campaign]	
Petition [Helps engage staff in campaign, offers vehicle to engage with public and demonstrate scale of support]	
Publicity stunt [Particularly helpful for attracting media attention to the campaign]	
Report launch [Analysis of the contract, covering inadequacies of the procurement process and failures in service delivery / costs can be critical in persuading decision makers engaged in commissioning]	

<p>Letter writing campaign</p> <p>[Can be deployed to highlight the issue among the local media or to raise pressure on local elected officials]</p>	
<p>Lobby</p> <p>[May involve attendance at scrutiny committees, cabinet meetings or councillor / MP / Member of devolved government surgeries]</p>	
<p>Equality impact assessment</p> <p>[Pressing a public authority to conduct an Equality Impact Assessment of the contracting out of a service can assist pressure on commissioning bodies by exposing the extent to which low income, women, ethnic minority and possibly disabled staff are damaged by outsourcing. UNISON's template impact assessment⁷ may offer a useful reference]</p>	

⁷ <https://www.unison.org.uk/unison-eia-guidance-and-flowchart-jan-2022/>

Winning allies to strengthen the campaign

A strong membership dedicated to taking the insourcing campaign forward is a cornerstone of any successful initiative. But the campaign will also need to go beyond the workforce to win influential allies who can exert pressure on the decision makers who will determine whether:

- A contract will revert to in-house provision at its conclusion;
- The contract will be put out to tender once more;
- An in-house bid will form one of the options during the tender process.

In order to do this effectively, the campaign team will need to be clear about the arguments it's making for in-house provision and what groups / individuals it is targeting.

The key arguments

The case for in-house services is typically built around the following key arguments.

Template for detailing case

Argument	Evidence
Contractor staff are treated unfairly in comparison to those staff directly employed by the public authority	[Possible source - the template developed under the Providing Information section of this guide / evidence of the turnover rates climbing because of staff discontent / as well as more grievance cases / disputes]
Contractor staff have lost the right to bargaining collectively over their pay, terms and conditions	[Possible source – this should be evident from the loss of a recognition agreement and absence of negotiations over staff terms]
The contractor has been generating major private profits despite service issues / attacks on staff terms and conditions	[Possible source – Contact the Bargaining Support Group via bsg@unison.co.uk for details of the contractor's financial results. Contractors often determine pay, terms and conditions according to the profitability of an individual contract. However, the profitability of the contractor's wider group can still offer a useful reference point.]

<p>The contractor's low wage model has a damaging effect on the local economy</p>	<p>[Possible source – Obtain details of the number of staff on the National Minimum Wage or wages below the Living Wage to support this point. If not available from any contractor source, it may be useful to conduct a short staff survey]</p>
<p>The standard of service has declined since the contractor took over and / or has not matched promised performance levels</p>	<p>[Possible source - Key performance indicators monitored as part of the contract / surveys of staff / surveys of service users]</p>
<p>The cost of the service has surpassed the original budgeted cost (some contracts have been notorious for exorbitant charges for any deviation from agreed terms)</p>	<p>[Possible source – An FoI to the public authority (an authority may try to hide behind commercial confidentiality, though there is a strong case that cost is a matter of public interest) / seeking details of costs charged for changes to the contract may also offer those examples of excessive add-ons]</p>
<p>The public authority has lost flexibility in how it manages its business</p>	<p>[Possible source – Any examples are most likely to come from the experiences of staff working in the contractor and / or the directly employed public authority staff they work alongside]</p>
<p>Outsourcing has a particularly damaging effect on groups that display protected characteristics under the Equality Act and a public authority has a duty to protect under the Public Sector Equality Duty [more detail carried in UNISON's Equality and Diversity guide⁸ and Northern Ireland equivalent outlined at Equality Duties⁹]</p>	<p>[Possible source – The model survey set out in Appendix 2 to this guide may enable collection of data to support this argument]</p>

⁸ <https://www.unison.org.uk/content/uploads/2020/03/Bargaining-for-equality-and-diversity-guide-and-model-policy.pdf>

⁹ <https://www.unison.org.uk/get-help/knowledge/discrimination/equality-duties/>

All the arguments built around demonstrating a failure in delivering on the promised terms of the contract may be greatly assisted by the commissioning of a report on the subject, where there is ground for believing such a study will produce useful results.

The [Association for Public Service Excellence](#)¹⁰ (APSE) has considerable experience in conducting such work. Therefore, the branch may find it useful to approach APSE to explore the opportunities. The APSE unit that deals with insourcing is led by Andy Mudd, who can be contacted on - amudd@apse.org.uk. APSE usually deal with local government cases, but are open to enquiries from other sectors, particularly where the outsourcing relates to generic services, such as catering and cleaning, that are bought in across sectors.

Some insourcing campaigns have made an APSE report a centrepiece of their campaign because it is a respected source that is liable to hold some sway over key decision makers.

Branches may seek to consult with their region over a possible bid to the Campaign Fund for resources that would help support campaigns for insourcing and any research/consultancy that would underpin them.

Guidance and an application form for the Campaign Fund are set out on this page of the UNISON website

<https://www.unison.org.uk/about/our-organisation/political-affiliations-and-support/our-political-funds/>

¹⁰ <https://apse.org.uk/index.cfm/apse/>

The key targets

Once the key arguments have been established, the campaign team must establish a clear picture of who it is targeting with those arguments.

The following table offers a template for identifying the groups to be targeted, the goal of communication with that group and a timetable of actions to exert influence over that group.

Template for targeting external groups

Broad group	Specific group	Target	Timetable of actions
Service users			
Community groups			
Media			
Public authority bodies with responsibility for overview and scrutiny (e.g. council committee/trust board/governing body)			
Elected officials, such as councillors, MPs and Members of devolved governments			
Public authority senior management group			
Other			

Service users

Surveys repeatedly attest to the popularity of public authorities providing services directly and a widespread distrust of private company involvement in service delivery.

A survey conducted by Survation on behalf of the Association for Public Service Excellence (APSE) in 2016, which included booster samples across the country to ensure equal regional coverage, found that:

- Six times as many people trusted their local council (60%) to provide services in their local area over a private company;
- 64% of people want to see more services run in-house by councils;
- 61% of the public think that local and central government should try to run services in-house first, before outsourcing;
- 64% of people distrust outsourcing companies, with only 21% of people trusting them.

These sympathies will often appear among the users of the service that has been contracted out by the public authority.

In some cases, the users of a contracted-out service may be principally an internal audience, while in others the users will be much more directly members of the public.

Service users are most likely to be interested in the arguments that can be made about the deterioration in the quality of service and rising costs.

The union may be able to share with service users the materials that highlight declining standards. If there is some form of service user representative / body (such as an official NHS patient rep), service users may be able, in turn, to feed back their perspective on service delivery.

Community groups

Community groups may overlap with service users, but will frequently have some kind of wider interest in the issues at stake than their personal experience of the service.

For instance, a community organisation for advancing the local economy or a city-wide Living Wage initiative may have an interest in supporting insourcing because they want to discourage low-paid employment by local employers.

Equally, a local disability rights group may have concerns about the way services have changed for disabled users since the contractor took over and see insourcing as a way to tackle discrimination.

There are clearly a wide array of community groups operating in any local area, so narrowing down the potential groups that may have an interest in supporting insourcing will depend on the knowledge and contacts of the campaign team, and may also benefit from drawing in the contribution of the wider contractor workforce.

Community groups can include such bodies as parent teacher associations, resident associations, trade union councils, religious groups, youth groups or student unions.

Media

Local media can be used to amplify any campaign. Local journalists from print, radio and TV have a strong interest in running stories on developments at major public authorities, particularly where a service has come in for criticism or a dispute is developing over injustice in the treatment of contractor staff.

The media will frequently be most keen to illustrate the story through the personal experience of individuals to grab the attention of readers, viewers or listeners. It is important that members consider whether they are able to provide personal testimony on their experiences. This needs to be managed to ensure that they do not experience detriment from expressing their opinions.

Rallies, demonstrations and marches can offer a valuable focal point for attracting media attention, along with creatively devised publicity stunts.

Writing a news release to initiate any media work is a skill that needs work and [UNISON's general campaigning guide](#)¹¹ offers comprehensive advice on all the issues to be considered, alongside moving into the more demanding requirements of providing interviews for the press.

The campaign team's regional staff should be able to draw on the expertise of the regional press contact to ensure the skills are in place to handle media work.

Public authority bodies with responsibility for overview and scrutiny

Local authorities will generally have an overview and scrutiny committee, which is required to maintain an ongoing assessment of the performance of outsourced contracts.

Local authority overview and scrutiny committees can also take on a wider remit that assesses the delivery of health and police services in the local area. Universities will also typically have a scrutiny committee of some kind.

The campaign team should obtain a clear picture of when these committees meet, the members of the committees, the opportunity to obtain copies of the materials under discussion and the scope for a union representative to attend.

These committees can provide a useful source of hard data on the performance of the contract targeted for insourcing, may offer an opportunity to request information on the contract and a chance for the union to input to the deliberations of the committee.

¹¹ <https://www.unison.org.uk/content/uploads/2013/06/On-line-Catalogue193083.pdf>

Elected officials, such as councillors, MPs and Members of devolved governments

Targeting councillors, Members of Parliament at Westminster or Members of devolved governments with a case that shows the deteriorating standards of service, poor value for money or the injustice of staff treatment, can form a key part of the campaign.

When constructing a campaigning plan targeting elected officials, consider these points:

- Branches may seek to present their case by writing to elected officials or encouraging members / staff to join a letter writing campaign.
- Personal meetings, perhaps conducted through councillor / MP / Member of devolved government surgeries, are frequently a more effective way to build a relationship with an elected official.
- Making contact with the Labour Link regional contact officer can offer the most effective route for presenting the branch's case to a group of Labour councillors / MPs / Members of devolved government.
- However, non-Labour councillors / MPs / Members of a devolved government should not always be regarded as a lost cause. Clearly, the representatives of different political parties may have differing ideological views of outsourced or in-house service provision, but some can be persuaded to consider an in-house solution on the pragmatic grounds that a contractor is not delivering value for money or that all options have not been properly considered. Independent studies of these dimensions, such as that conducted by APSE for the UNISON branch at North Port Talbot Council (and outlined in Appendix 1 to this guide), can be crucial for swaying such officials toward an in-house option.
- The timing of campaigning to exert maximum pressure on elected officials can play an important part, so make sure you establish the election timetable they face so that, where possible, they feel the full force of the campaign as election dates approach.
- Co-ordinated action with service users and community groups, alongside a media campaign, will ensure elected officials understand the strength of feeling beyond the union among their wider electorate.
- Identifying the relevant councillors / MPs / Members of a devolved government for the area where the contractor delivers services can often be carried out through the local council website. However, these sites may also help
<https://members.parliament.uk/members/commons>
<https://www.gov.uk/find-your-local-councillors>
<https://www.parliament.scot/msps/current-and-previous-msps>
<https://senedd.wales/find-a-member-of-the-senedd/>
<http://aims.niassembly.gov.uk/mlas/search.aspx>
- Where MPs / Members of a devolved government are supportive, it may be possible to gain further publicity through a written or an oral parliamentary / assembly question, putting down a motion or a contribution in a parliamentary / assembly debate.

For Local Government branches, the [“Think Twice” guide](#) provides a useful tool for pressing councillors to keep the option for in-house delivery open, as a privatised contract heads toward conclusion.

Ideally, campaign work would result in a public authority deciding that at the closure of a contract it will revert to an in-house provision.

However, it may be that the authority decides instead that it will put the service out to tender once more. The task then becomes to ensure that the authority allows for an in-house bid as part of that tender process.

[UNISON's procurement guide](#) offers a thorough step-by-step outline of the tendering process and the opportunities for maximising the chances of a successful in-house bid.

In order to head off the possibility of a contract going out to tender once more, it may be worth considering if it will be possible to persuade a commissioning body to adopt an “Insourcing First” policy, which establishes insourcing as the preferred option when a contract is up for renewal.

To assist any such initiative, Appendix 3 of this guide sets out a model “Insourcing First” motion that can be placed for the public authority’s relevant decision-making body.

Public authority senior management

The value of getting a public authority's senior management on side in constructing a solid argument for in-house provision should not be underestimated.

Senior managers will frequently have access to information and skills that can turn an in-house option from a vague aspiration to a well-reasoned target, based on a comprehensive business case that is liable to persuade commissioning decision makers.

A business case will typically entail detailing at least the following dimensions of an in-house solution.

- **Benefits** – The standard of service that can be delivered to service users as well as wider benefits to the organisation, such as flexibility in responding to changes and impacts on staff morale, motivation, turnover.
- **Costs** – The cost requirements to meet the specified benefits, in terms of both capital expenditure and staffing costs. In some cases, large contractors can enjoy economies of scale in their operations that make it difficult for an individual public authority to compete. Some authorities have sought to address this problem by joining forces with neighbouring authorities to reduce costs through combined functions.
- **Timescale** – Particularly when a service has been outsourced for a considerable period of time, putting in place the capacity to deliver the service in-house can take some time. Building the capital requirements and developing the skills among staff to restart in-house delivery has to be factored into a realistic timescale.
- **Risks** – All business cases carry risks that expected benefits, costs and timescales will be thrown off course by unexpected events, but risks will generally be a strength of an in-house option, as it avoids the risk of a contractor folding, pulling out of a contract or imposing heavy penalties for changes to requirements.

Alongside the knowledge and skills of senior management, the union is in a strong position to draw on the experience of staff themselves, who can understand better than anyone how a service should be redesigned for effective in-house provision.

Local negotiating bodies (JCC / JNC) may offer a useful means to highlight issues concerning contractor staff, service provision and reputational damage. It is important to keep such issues on the agenda in this way, even if the commissioning body is not directly responsible for the staff. The commissioner is paying for services using public money and therefore ensuring value for money is a legitimate concern.

Appendix 1 - Case studies

Neath Port Talbot Council

In 2021, the UNISON branch at Neath Port Talbot Council launched a campaign to bring the council's leisure services in-house.

The service had been contracted out over 20 years previously, leading to attacks on terms and conditions, including attempts to move away from NJC terms, new staff denied access to the Local Government Pension Scheme, creation of a two-tier workforce between management and frontline staff, as well as a proliferation of zero hour and casual contracts.

The branch was in a strong position, with around 90% of the workforce on the contract UNISON members, a well organised team of reps and substantial discontent among that workforce about their treatment.

The campaign began with the assembly of a team involving both branch officials and regional staff, which put together a campaign plan and agreed to meet bi-monthly.

The campaign went on to take the following actions:

- Commissioned the Association of Public Service Excellence (APSE) to analyse the council's approach to commissioning the service and arguments for putting the service out to tender once again at the conclusion of the contract. The resulting report showed both a failure to achieve predicted savings at the time of winning the contract and exposed failures to adequately consider all options in the tender process and present a clear business case.
- Created and promoted a petition to bring services in house, which the branch was able to put to the council - <https://www.change.org/p/neath-port-talbot-councillors-our-councillors-save-our-leisure-services>
- Gained media interest in publishing a press release which highlighted poor practices adopted by the contractor in delivering services to the public.
- Maintained a sustained lobbying effort, targeting councillors and politicians, which drew on the UNISON Labour Group. The campaign was able to maximise pressure on councillors as it coincided with local elections. Lobbying was also able to draw on general Welsh Labour Party policy to recommend the return of services to local authority management and ownership.
- Webinar conducted on basis of the APSE report release to emphasise findings to the public and councillors
<https://attendee.gotowebinar.com/recording/4042018467605472518>
- Held demonstration outside the main council building <https://cymru-wales.unison.org.uk/news/2021/10/neath-port-talbot-demonstration-ahead-of-critical-council-vote/>

The campaign finally resulted in victory in early 2022 <https://cymru-wales.unison.org.uk/news/2022/02/landmark-move-to-run-leisure-services-publicly-could-be-blueprint-for-authorities-across-wales/>

Barts Health NHS Trust

In April 2021, the UNISON branches in Barts Health NHS Trust launched a campaign to bring all outsourced services under the complete control of the trust. This decision followed key contentions identified within outsourced services managed by the private contractor Serco (i.e. staff in security, portering, catering, reception, domestic, helpdesk and laundry). Staff were poorly managed, with no job security, poorly paid within a multi-tier workforce, poorly motivated, poorly trained, suffering low morale, working in jobs that provided no clear career pathway and burdened with heavy workloads.

These services were understaffed, poorly equipped and relied heavily on agency staff. 1,800 people were employed by Serco, who had secured the largest soft facilities management contracts in the NHS. These employees were predominantly from the Black and ethnic minority communities. Because their employee contracts were inferior to NHS Agenda for Change terms and conditions, they did not feel included in the Barts Health family.

The branches vehemently believed that the outsourcing of these services to a private contractor impacted negatively on frontline workers because they were left on low pay and on lesser terms and conditions than their counterparts employed by the NHS. As a result, the UNISON branches intensified their campaign and initiated talks with Barts Health NHS Trust on restoring these services under the direct employ of the trust.

In March 2022, Barts Health announced that previously outsourced staff working in facilities management at five hospitals across East London would be brought back into NHS employment from May 2023.

The UNISON branches negotiated to secure Agenda for Change contracts for employees being insourced. They also tackled issues around appropriate banding of security staff, careers paths and inadequate take home pay.

The branches found that the success of the campaign at Barts was linked to five main factors:

- Identifying in-housing as a key workplace issue important to members and having clear plans, goals, objectives, timelines and committed resources (including regional and branch support) towards campaigning and accomplishing the task;
- Time invested in laying the groundwork by building UNISON membership among the workforce, organising and recruiting as many members as possible to gain support for the campaign and developing bargaining strength;
- Gaining a clear picture of the terms of the contract, particularly the critical timelines and the point at which early termination would not lead to financial penalties;
- Taking a partnership approach in engagements with the employer;
- Developing a strong, accurate knowledge of both the services being insourced and the employers' policies to enable the branch to negotiate effectively.

The campaign resulted in victory. A clear timeline is now in place for all outsourced services to be phased back into the trust from November 2022 to May 2023.

Kings College London

Kings College London (KCL) is a large university with nearly 10,000 employees and over 27,000 students. It has a global reputation and attracts students and staff from all over the world. Since 2014, the private contractor Servest had taken over one of the cleaning contracts at KCL and CIS provided security.

The UNISON branch realised that these workers were on worse terms and conditions, worse pay and had a worse pension scheme than those working directly for KCL. Those working for the contractors suffered from a range of workplace problems which the employer failed to address.

The branch started working with the Servest and CIS outsourced members in 2014 and has also worked with those employed on the Bouygues contract. Most of the workforce did not speak English as a first language and there were only four union members. The branch activists, with regional support, spent time talking to the workers, translating information about the union into the languages that the workers spoke, talking about how trade unions in the UK operate and what we do. The branch was very flexible about meeting the workers at the times that suited them – e.g. before or after shifts, in the evening or at weekends and the branch organised social events and family activities to get to know the workers and build union membership.

The initial stages of the campaign were not explicitly about insourcing but about listening to the workers about how they are treated and explaining the policies and their contractual and legal entitlements.

The campaign then moved into organising for some quick wins. For example, securing a new annual leave policy that enabled workers to go away for up to three weeks and securing the proper resources needed for their work. Winning these smaller wins was important to build trust in the union and to realise that change is possible together.

When the campaign started to focus on insourcing the union drew up a table to show the differences between the contractual entitlements for those employed directly by the university and those working for the contractors to make it clear that they stood to gain better pay, conditions and pensions.

The campaign used a mix of bottom up and top-down approaches – asking what the members want and showing what can be achieved. Claims for parity in contracts and pensions were lodged and when this wasn't met the dispute escalated to include strike action. The union also influenced the university's council members as the key decision makers. We had to clearly expose the poor conditions of employment until some key council members became advocates for insourcing. We demonstrated how outsourced labour wasn't compatible with the university's ethos and mission statement.

Finally, the Vice Chancellor, with a few board members, asked to meet with the union when we were about to strike again. There was a vote at the university council, with 70% supporting the proposal to bring staff in-house.

It took approximately four years to win the campaign and the employer needed 12-18 months to establish the organisation needed to bring the service in-house. We now have 81% membership across these services with active workplace stewards.

Key issues:

- Allow enough time to build union density and organisation and to build trust with the workers;
- Spend time with the members listening to their issues and concerns. Go to the members in the places that they work and meet them when they have time;
- Support from the branch is vital to make the case for insourcing – build the campaign with directly employed members too;
- Use influence to gain support from key decision makers;
- The process won't be smooth – there have been pay issues after going back in-house that have needed union interventions;
- Make sure that you're talking with all parts of the "triangle" - the workers, the contractor and the main employer who has contracted out the service;
- Identify other key allies - students and students' union, other unions, sympathetic council members.

Appendix 2 – Model survey



UNISON SURVEY

UNISON [branch name] is currently considering a campaign to return the services currently provided by [contractor name] to direct provision by [name of public authority]. However, to understand whether such a campaign would be in line with your experiences and views, we would greatly appreciate it if you could spare the time to complete this survey.

The survey covers just 13 questions and would normally take less than five minutes to complete. All responses to this questionnaire are anonymous and will be treated as confidential.

YOUR EXPERIENCES AND VIEWS

1. How do you see your pay, terms and conditions compared to equivalent staff working directly for [name of public authority]?	
---	--

Roughly equal	
---------------	--

Worse than [name of public authority] staff	
---	--

Better than [name of public authority] staff	
--	--

2. If you see the pay, terms and conditions of equivalent staff working directly for [name of public authority] as being significantly better or worse, please briefly summarise the main differences below
--

3. If you previously worked on the contract when it was provided directly by [name of public authority], how have these factors changed since the contract was taken over by the current contractor?				
	Better	Worse	Remained the same	Don't know
Quality of service				
Staff morale				
Rate of staff leaving their job				

4. What would you describe as the three biggest issues you would like the union to campaign to improve?	
1	
2	
3	

5. Would you support a campaign to return the service to direct provision by [name of public authority]?	
Yes	
No	
Don't know	

6. If services were returned to direct provision by [name of public authority], what changes should be made to the way the service is delivered to achieve improvements for staff and service users?

PROFILE

(These questions help us understand the differing views of the various groups that make up the [name of contractor] workforce)

7. Did you previously work for [name of public authority] before the service was contracted out to [name of contractor]?	
Yes	
No	

8. What income band does your basic salary fall in?	
Less than £10,000	
Between £10,000 and £19,999	
Between £20,000 and £39,999	
£40,000 or over	
Prefer not to say	

9. How do you describe your gender?	
Male	<input type="checkbox"/>
Female	<input type="checkbox"/>
In another way	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

10. How do you describe your ethnic origin?					
Asian UK	<input type="checkbox"/>	Black African	<input type="checkbox"/>	Chinese	<input type="checkbox"/>
Asian Other	<input type="checkbox"/>	Black Caribbean	<input type="checkbox"/>	Irish	<input type="checkbox"/>
Bangladeshi	<input type="checkbox"/>	Black UK	<input type="checkbox"/>	White UK	<input type="checkbox"/>
Indian	<input type="checkbox"/>	Black Other	<input type="checkbox"/>	White Other	<input type="checkbox"/>
Pakistani	<input type="checkbox"/>	Black mixed heritage	<input type="checkbox"/>	Other mixed heritage	<input type="checkbox"/>

11. Would you describe yourself as a disabled person?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Prefer not to say	<input type="checkbox"/>

12. What is your involvement with unions representing staff at [name of contractor]?	
A member of UNISON	<input type="checkbox"/>
A member of another union	<input type="checkbox"/>
Not a member of any union	<input type="checkbox"/>
An official for UNISON (please detail your post below)	<input type="checkbox"/>

13. Would you be interested in joining or playing a more active role in UNISON?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
If Yes, please provide your contact details below	

Online survey providers

[SurveyMonkey](#) is one of the most widely used online survey services but UNISON now recommends [Alchemer](#) because you can request for the data to be hosted within the EU , making it compliant with the new UK-GDPR (General Data Protection Regulation) and amended Data Protection Act (2018) that took effect on 31 January 2020 following Brexit. SurveyMonkey does not have this functionality. Alchemer is also more transparent about how it stores personal data.

There is a free version of Alchemer which will handle up to 100 responses. However, the basic paid package allows for unlimited surveys and responses, while allowing for anonymity in those responses. It is possible to sign up for Alchemer here:

<https://www.alchemer.eu>

[Please make sure that you use the .eu address and not the .com address so that it is EU based]

Alchemer pricing starts at £34.56 per month.

The Alchemer support website carries these useful links:

- Tutorials: <https://www.alchemer.com/tutorials/>
- Building accessible surveys: <https://help.alchemer.com/help/how-to-build-accessible-surveys>
- Alchemer Support team: <https://help.alchemer.com/help/alchemer-support-hours>

Alchemer's instructions on how to make voting anonymous are here:

<https://help.alchemer.com/help/anonymous-surveys>

For every Alchemer account that contains UNISON member data, a branch elected official should notify their Regional Head.

In distributing any Alchemer survey, a data protection statement should be included as follows "All responses to this survey are completely anonymous. The data collected in this survey will only be used by UNISON for the purposes of understanding members' views. The survey is run using [Alchemer](#), run on servers at their data centre in the European Economic Area. The data will not be sent outside of the EEA. This data will not be shared with other 3rd parties, and it will only be stored for as long as UNISON needs it. It will not be used for any other purposes. You can read UNISON's Privacy Policy at <https://www.unison.org.uk/privacy-policy> "

If you have any data protection queries in relation to online surveys you are using please contact UNISON's Data Protection Officer at dataprotection@unison.co.uk

Appendix 3 – Model “Insourcing First” motion

[Public authority] notes that there is a growing tendency toward insourcing across much of the public sector. This is being driven by an increasing awareness of the value of public services in supporting local economies and businesses, providing better services for residents and business, and directing resources more cohesively to where they are needed.

[Public authority] believes that the case can be made that insourcing services:

- Is cheaper in the long run and is better able to deliver efficiencies;
- Give greater scope to improve performance against benchmarked services;
- Deliver greater flexibility and integration with existing services;
- Provide better and more secure employment and leads to stronger local supply chains;
- Are more democratically accountable, transparent and enhances local control of service delivery.

[Public authority] therefore agrees:

- To systematically review each existing outsourced contract as it approaches expiration;
- That reviews be undertaken in a timeframe that means proper consideration can be given to insourcing well in advance of the date before contract renewal decisions need to be made to ensure that full consideration can be given to the potential cost / efficiency / performance / quality / democratic accountability benefits of insourcing;
- That insourcing should be considered when assessing the future of any outsourced contract. Insourcing should be included as a favoured option and should be genuinely and robustly considered;
- To properly evaluate how insourcing can be used to support local economies, and the environment, through jobs, skills, supply chain management and local spend. This should be evaluated when insourcing is considered and fairly weighted on any options appraisal;
- Insourcing should be viewed as a form of innovation in both service delivery and resource allocation. Insourcing planning should encompass immediate operational continuity alongside longer term plans for service improvements which align to local needs and strategic objectives;
- That trade union and workforce engagement and involvement in reviews are both helpful and essential