



## **UNISON's New Application Forms: Questions and Answers**

### **Why has UNISON got new application forms?**

Changes to the law taking effect in March and May mean that the questions we ask people who want to join the union, the way we deal with their information and how we handle their payments need to change.

### **What are the changes?**

There are two pieces of legislation: the Trade Union Act of 2016 and new data protection regulations, known as GDPR.

These changes will affect every way people join the union – whether online, by phone or by filling in a physical application form.

The online joining form at [join.unison.org.uk](https://join.unison.org.uk) have been changed, alongside the introduction of new paper forms.

### **What do we do with old, unused forms?**

Recycle them immediately! From 1 March they no longer comply with the law.

### **...and on our websites?**

Any online joining forms on branch or regional websites should have been updated or taken down. We advise linking to the online join form (<https://joining.unison.org.uk/>). But if you do include a PDF of the paper form on your site, you must replace it with the new version and ensure that the old version of the application form is no longer accessible by deleting it off your site or servers.

### **The Trade Union Act and UNISON's political fund – what does it mean?**

The Trade Union Act means new members – those who join after 1 March 2018 – have to actively sign up to pay into the union's political fund by making a campaign fund contribution.



This will mean them agreeing to pay an additional 5%, over and above their normal subs, to fund UNISON's political and campaigning work.

Initially, this campaign fund contribution will be collected via Direct Debit. To facilitate this, and meet data protection regulations, we are introducing separate Direct Debit and DOCAS membership forms.

Under new data protection rules, political belief is what's known as "special category" information, which should not be shared with third parties, including employers.

The Act, and these changes, do not apply to Northern Ireland.

### **Using the new purple DOCAS form**

Because of changes to legislation we cannot currently collect political fund contributions through DOCAS. Therefore they have to be collected separately and by Direct Debit.

The Direct Debit section of the purple DOCAS form is for political fund contributions *only*. You must process this part of the application form as you would all Direct Debit applications. Please follow the usual procedure and send the Direct Debit mandate to your region for safe storage.

### **And beyond the joining process?**

The Act included a one-year transition period from 1 March 2017 to 1 March 2018. UNISON used that period to set up a working group, led by lay members, on the changes that we needed to introduce. This included two union-wide consultations.

As a result, rule changes will be going to this year's national delegate conference so that our rules governing the political funds comply with the law.

One change will see the union's general political fund, or GPF, renamed the Campaign Fund, and the affiliated political fund will be known as UNISON Labour Link.

### **So what's all this about data protection?**

The new General Data Protection Regulation (GDPR) comes into force in May 2018. Under it, all organisations have to seek specific, carefully worded, clear and transparent permissions before they contact people.

This requirement applies to all of UNISON: branches, regions and head office.



The regulations aim to protect individuals from the misuse of their personal data by any organisation. It has legal force and there are very large fines for non-compliance.

This will change what information UNISON collects about members and how it collects it.

The basic rule is that any information we ask for must be necessary for the purpose we collect it for.

So the new forms will include very clear explanations of how we will and will not use the information people provide on the form, including allowing them to choose whether or not the information they give can be used to communicate with them through various channels.

### **What about equality monitoring?**

The new regulations are specific on how organisations process “special category” personal data – things such as ethnic background, political belief or trade union membership.

None of this information can be shared with an employer – except union membership – through a DOCAS form.

Equality monitoring information is not necessary to joining the union and under the law it would be “excessive” data collection if we collect it from people when they apply to join.

However, UNISON is committed to monitoring the diversity of our membership.

We can legitimately collect this information from our members, should they wish to provide it, but not as part of the application to join the union.

UNISON Centre will be working with representatives of all of the union’s self-organised groups to develop a new framework for gathering information, linked to our membership information, and looking at new ways to engage our members in this process.

### **How do these changes match with devolution?**

The Trade Union Act applies in all UK jurisdictions except Northern Ireland. So there has been no new form introduced there to take account of the political fund changes introduced by the Act.

However, the new GDPR data regulations apply in all four countries: England, Wales, Scotland and Northern Ireland. New forms for Northern Ireland, which will match the regulation’s requirements on data handling, will be produced for Northern Ireland for May.



### **What about branches' tailored application forms?**

Branches will still be able to over-print application forms with their branch branding.

But the content of the form will not be amendable. The form has undergone numerous legal checks to make sure it complies with the law.

### **How do we get the new forms?**

Forms can be ordered in the usual way from the online catalogue at

[www.unison.org.uk/catalogue](http://www.unison.org.uk/catalogue), or by emailing [stockorders@unison.co.uk](mailto:stockorders@unison.co.uk), quoting the following stock orders:

- **Direct Debit-only** membership application form. Stock number: 3866
- **DOCAS-only** membership application form. Stock number: 3873
- **Bilingual Welsh/English, Direct Debit-only** membership application form. Stock number: 3868
- **Bilingual Welsh/English, DOCAS-only** membership application form. Stock number: 3881