



This report has been produced for the Department for Business, Innovation and Skills by the Working Lives Research Institute at London Metropolitan University

Union Modernisation Fund Round One:
Self-Assessment Follow-up

Leena Kumarappan
Sian Moore
Working Lives Research Institute,
London Metropolitan University
Sian.Moore@londonmet.ac.uk
0207 320 1318



March 2010

UMF Round One – Self-Assessment Follow-up

Acknowledgements

The researchers would like to thank all the trade union officers who gave up their time to be interviewed in the follow-up survey.

UMF Round One – Self-Assessment Follow-up

Summary

'It was called the most dramatic development in more than a generation. Nothing like this has touched such a broad level in the union from general secretary right the way down to the local officer. It has changed radically the way we do things in the head office' (project officer, NUT)

- Round One of the Union Modernisation Fund has supported innovative and qualitatively distinctive projects in unions, which they would not otherwise have had the capacity, skills or resources to deliver within similar timeframes;
- The delivery of projects has resulted in organisational learning. In particular the UMF has strengthened project management experience and skills within unions and provided effective models which unions are adapting and generalising;
- UMF projects have given unions experience of working with external providers in terms of project design and in some cases delivery. These relationships could present a challenge, but also provided resources, expertise and an independent perspective;
- Unsurprisingly the implementation of projects generated challenges within unions and in some cases scepticism or fears about change. Delivering projects to specified timetables often proved difficult, particularly in unions with limited staff resources. Communication, engagement and training at all levels of the union generally appears to have overcome any resistance;
- The delivery of UMF Projects has had an impact on wider union organisation, involving an examination of horizontal and vertical relationships within unions. In particular a number of projects have changed the internal dynamic by improving two way communication, inclusion and engagement with representatives and members;
- As well as improving the efficiency of communication systems, UMF funding has allowed unions to develop new strategic and organisational approaches that have broken with existing and often entrenched ways of doing things. In some cases project implementation has led to structural change within unions in terms of transforming management systems or even representational structures, particularly around equality;
- Changes resulting from UMF projects are being embedded and are proving sustainable. New systems or initiatives are being refined and improved and extended to new regions and/or levels of the union. In some cases they are providing a basis for further projects;

UMF Round One – Self-Assessment Follow-up

- There is evidence of cultural change both internally, but also externally in the way that unions have adapted policies and structures to changing labour markets and the changing needs of their members;
- A number of projects have had an impact beyond the organisation, in terms of developing enduring relationships with new groups of workers, community groups, employers and national and international union federations;
- There are some signs that Round One projects have had a 'demonstration effect' in generalising experience and systems beyond the union – this is likely to be more evident in the evaluation of subsequent rounds.

UMF Round One – Self-Assessment Follow-up

1. Introduction

The Union Modernisation Fund (UMF) was established by the Department of Business, Innovation and Skills (BIS) in July 2005 to support innovative projects designed to promote union adaptation to changing labour markets. In Round One BIS funded 35 projects allocating £3 million across 32 trade unions. In terms of the priority themes identified by the UMF, the projects largely addressed those aiming to improve two-way communication with union members; focussing upon labour market diversity and applying modern management methods. The UMF aims to explore the potential for transformational change within unions and for innovative activity to provide a demonstration effect to the wider union movement. The evaluation of Round One concluded that there was ‘strong evidence that the UMF has generated a high degree of potential for transformational change within trade unions’, which was starting to impact on the day-to-day activities of unions (Stuart et al, 2009).

The evaluation report distinguished between project outputs and the more substantial and sustainable outcomes that these could lead to in terms of the organisational culture and practice of unions. One of the key challenges identified by the evaluation was the way that modernisation can raise questions about unions’ traditional systems and ways of operating.

2. The context

In late 2009 BIS embarked upon a UMF self-assessment exercise designed to improve understanding of the degree of long-term cultural or behavioural change that Round One of the UMF has engendered. This was based upon a survey questionnaire to UMF project managers. The questionnaire asked respondents to reflect upon the extent to which the union has built upon earlier UMF work and the extent to which it has generated wider change. Respondents were informed that there would be follow up interviews with a selection of the projects to allow for more in-depth consideration of the issues identified in the responses. BIS commissioned researchers from the Working Lives Research Institute (WLRI) at London Metropolitan University to undertake follow-up research, based upon telephone interviews, on a sample of projects which completed under Round One from a range of large and small unions covering the public and private sectors. The survey suggested that these all offered potentially interesting additional insights and this report reflects the outcome of these interviews.

3. Research methods

The follow-up research was based upon telephone interviews with eleven UMF project managers from ten trade unions undertaken in February and March 2010. The eleven projects were selected by BIS on the basis of responses to the UMF self-assessment exercise and were designed to cover a range of unions, projects and project outcomes. BIS contacted the project officers by email to inform them of the follow-up interview and that a researcher from the WLRI would be contacting them to arrange a

UMF Round One – Self-Assessment Follow-up

telephone interview. The interviews were based upon a semi-structured questionnaire (Annex 1), but also upon issues identified in the survey responses. They concentrated upon how projects had made a difference within the union; how challenges had been overcome and the nature of the longer term changes identified or planned. The interviews were recorded with the permission of the respondent and in all but two cases were with the original project officer responsible for the UMF project. Where this was not the case one project manager had moved to another role in the union, the other had left the union. In the first case the interview was conducted with another officer who had been involved and in the second with an officer involved in sustaining the project. All respondents understood that the unions involved would be identified in the research and that it might be published at some point.

Table 1: UMF projects covered by the research

UMF Code	Trade Union	Project Title
002	Retained Firefighters Union (RFU)	Local representatives' empowerment strategy
004	GMB	Race and Diversity
005	Communication Workers Union (CWU)	Reaching out
006	Bakers Food and Allied Workers Union (BFAWU)	Membership Diversity
009	National Union of Teachers (NUT)	Hearth – a web-based interactive resource centre
016	Equity	The Equity Web-site
017	Transport and General Workers Union (TGWU)	Migrant Workers Support Unit
020	Bakers Food and Allied Workers Union (BFAWU)	Membership and communications systems
031	Union of Shop Distributive and Allied Workers (USDAW)	Developing the USDAW management model
036	Trades Union Congress (TUC)	Developing an on-line support system for union professionals
041	Associated Society of Locomotive Engineers and Firemen (ASLEF)	Transforming Communications with Union Members

UMF Round One – Self-Assessment Follow-up

4. Findings

4.1 Making a difference

‘So, would it have happened? We would have had a go at it. Would it have been anything like what it was? Absolutely not. Without it we would be still years behind. And more importantly, things we learnt from that we are developing into other areas now and that definitely would not have happened. I think the bids have enabled us to do it better, to reach out more, to integrate more, to move forward at a faster pace, to become more responsive, to become proactive rather than reactive. It enabled us to build even better relationships with our employers.’
(Project Officer, BFAWU, Membership Diversity)

The UMF supported projects which unions would otherwise not have had the capacity, skills or resources to initiate and/or deliver, particularly within the timescales. A number of projects concerned the modernisation of communication methods and introduction or updating of database applications and development of internet-based communication infrastructures. For example, the BFAWU’s Membership and Communications project enabled the union to review and upgrade its membership records and information systems to establish two-way electronic communication in order to be more responsive to its membership and representatives. It had previously been referred to as a ‘Pandora’s Box’ in terms of the understanding within the union of broader modernisation issues, with the project identifying gaps in existing membership data and raising questions about the collection and nature of such data (Stuart et al, 2009). The project provided the union with the resources it otherwise would not have had, in terms of both personnel and technical capacity, to survey its members and representatives and to test the profile of the union against their perceptions, replacing a 25-30 year old database with something more fit for purpose and allowing improved accuracy and accessibility. In the RFU the project, to utilise IT solutions to support local representatives’ activities, would not have happened without the UMF funding ‘because of lack of resources’. In ASLEF UMF funding allowed for an improved web-site, but also mobile phone communication; the project manager conceded that the transformation of communications would ‘probably not have happened without UMF funding’ or at least within the timescale.

A number of the projects supported union adaptation to changing labour markets. In Equity the web-site allows members to market themselves to employers in a freelance labour market. In the case of the BFAWU the project modernised communications to a membership increasingly dispersed from factory to retail settings. A second and parallel UMF project allowed the union to adapt its services to new migrants from the EUA8 countries. Similarly, the TGWU’s Migrant Worker Support Unit enabled the union to respond to the specific needs of migrant and agency workers in those areas and sectors affected by the provisions of the Gangmasters Licensing Act 2004. The dedicated unit provided a central point of organisation and reference for migrant workers in a regionally based union that would not otherwise have existed.

UMF Round One – Self-Assessment Follow-up

Additionally the project supported the employment of two officers with specialised skills, knowledge and contacts that other officers and representatives did not necessarily have.

The projects were also innovative in their nature, approach and delivery and thus qualitatively distinctive. In Equity the UMF project developed interactive on-line directories of members on its website, 'a level of communication between members that couldn't have been dreamed of before' and leading to a substantial increase in the level of spontaneous communication with members. Equity did not previously have the resources to help members promote themselves through the union, but the access to technology it has provided has achieved this, it 'definitely would not have happened without the UMF funding'. In the CWU the Reaching Out project aimed to improve contact between the union and its grassroots, piloting new forms of communication including text messaging, teleconferencing, a website, internet provision and the use of laptops and multimedia in six regions. The project officer reported that the use of technology before the project had been confined to individuals; subsequently text messaging has become absolutely standard across the whole of the union and has been proven to be an effective and popular way of engaging with members. In the NUT the Hearth project, an all-embracing web-based interactive resource centre, has provided improved and extended access to authoritative information, advice, guidance and support at national, regional and branch levels. It is a sophisticated and interactive communication system including blog and forum facilities and a workshop system with model letters and templates for local officers.

Beyond projects addressing communication UMF funding has allowed unions to develop new strategic and organisational approaches that have broken with existing and often entrenched ways of doing things. In USDAW the UMF project aimed to revitalise the union's management structures and to develop strategic planning and processes with all activities linked to the strategy and measured through a performance management system supported by systematic staff training. In the case of the BFAWU's second and parallel UMF project, Membership Diversity, the project manager felt that without UMF funding, 'we would have tried to tackle the diversity issue in the old way and it probably wouldn't have worked quite frankly because we would have treated it in a way which was outdated – we didn't know this at the time'. For example, UMF funding enabled the union to identify and address the needs of workers with diverse cultural backgrounds in the food manufacturing sector in a 'much more professional, much more targeted way'. It developed literature in a range of languages and established local Polish groups of trade union activists and a website developed and run by Polish activists, allowing the union to become more responsive to a diverse labour market. In the GMB the UMF project assisted in the development of a strategy for diversity in the union and has meant that all its 600 employees have undergone training in race and diversity and now have an awareness of diversity issues that they previously did not. The project officer felt that the union's workforce was becoming more diverse and better reflected the membership. He perceived this as an indirect result of the attention the organisation was now giving to equality and diversity issues. The union has a network of migrant worker branches catering

UMF Round One – Self-Assessment Follow-up

specifically for needs of such workers and it was considered that this ‘wouldn’t have happened without this project’.

4.2 Project Management

‘I think in Round One the UMF didn’t realise how weak the unions were in terms of project management ... I would say that the UMF staff were superb and we learnt a lot from dealing with them and we were able to observe the way they dealt with issues and use those skills in our project management. Hearth was the start of serious project management and has since been used in other projects including UMF projects’ (Project Officer, NUT).

Unions in the survey have learnt from and generalised project management models emerging from UMF project funding. In the case of the BFAWU Membership Communication Project the project management team comprised four or five officials from different areas of the union with clearly defined roles. This model enabled the project to be delivered to a strict timescale and the project officer reported that, ‘the discipline we learnt from that UMF project we have now adapted to other union programs. That was a good system, it worked and we will adapt that in all our systems.’ The same project management model has been used in successive UMF projects and ‘a project management template developed’. In the RFU the UMF provided ‘a new experience of project management’ in a union with no previous project management experience. In ASLEF the project officer felt that the union had acquired project management skills. In the TGWU project delivery was by the project officers employed to run the Migrant Support Unit supported by senior officials, the regional secretaries and members from the education department. The GMB’s Race and Diversity project was managed by the senior management of the union and an external company with monthly meetings between senior managers of the nine regions and the company. ‘Champions’ were appointed in each region, with at least two staff members taking responsibility for delivery in each region.

In most cases, and particularly in those dealing with the introduction of new technologies, unions contracted out project design and in some cases delivery. There was sometimes limited experience of working with external contractors and relationships could present a challenge. However, external organisations provided resources and expertise that unions would not otherwise have had, particularly in smaller unions. In the RFU a university was contracted to provide independent and external advice on IT provision and this was seen as effective. Project delivery involved a team of three full-time officials from the union who met regularly with the team from the University. ASLEF also brought in an external IT provider, with the project managed by a steering group within the union. Although the IT provider continues to support the web-site it is now maintained by the project manager with smaller sites supported locally. In the case of the BFAWU’s Membership and Communication project the union managed the project but delivery was contracted out to an external company, for the project manager this provided extra resources that the

UMF Round One – Self-Assessment Follow-up

union did not have and could not have provided. In the case of the union's parallel Membership Diversity project seconded union officers delivered the project, but also engaged an external company to conduct a large survey of members and non-members. In Equity the use of an external provider was described as, 'very much a step into the unknown for the union; a change of personnel at the external supplier's caused some problems and raised the importance of drawing up specific project delivery contracts. In general for union officers the project entailed significant learning about website designing and the development of negotiating, management and project monitoring skills. The project management suggested that in retrospect the union might have employed a dedicated project manager, rather than making it an additional role.

Larger unions also valued the independent perspective and expertise that external organisations could bring. USDAW established 'task groups' for each of the five strands of its project, comprising around six people who concentrated on these areas of work and who were able to meet the project timetable. The Work Foundation provided consultancy advice and support to the project, which was seen as 'very valuable'. In the CWU, however, the relationship with the external contractor was more problematic, the procurement process was lengthy and difficult and the union 'sometimes felt at the whim of the IT companies'. The NUT's Hearth website was set up externally to the specifications of a project steering group within the union, which continues to maintain and develop the website. It was felt that the use of an external supplier helped the union keep to the project timetable. There was continuous liaison between the union steering group and contractor and the project manager saw the model, whereby the union provided and retained the internal knowledge, but delivery was outsourced, as transferable.

UMF Round One – Self-Assessment Follow-up

4.3 Organisational learning

‘There is no doubt that the project has fundamentally changed us for the better. Operationally we are performing much better now than we were three years ago. There is a marked difference in how we are doing things ... There is now a realisation that this is here to stay and that this is not going to be the flash in the pan that’s going to just disappear. And there is a widespread acceptance that what’s being done is effective. People can see that there’s been a change and that the union is bigger and stronger as a result of it. (Project Officer, USDAW)’

The implementation of the UMF projects unsurprisingly led to organisational challenges, but has also produced organisational learning within the unions. As indicated in the previous section one key benefit to unions has been in their experience of project management. In the case of the BFAWU a template for project management is being incorporated into the union structure and has led to improvements in time and workload management and the introduction of realistic and achievable time schedules for projects. The project has also led to greater involvement of union representatives in organisational initiatives.

One of the key challenges faced by unions was delivering projects within specified timetables. This was the case in the RFU where, because it is a very small union, the limited number of full-time staff had to work additional hours to ensure project delivery. In addition the general secretary retired during the course of the project and the project officer commented that it would now be difficult to apply for another project. Time management issues were also raised in the BFAWU, where the project officer reflected that normally such projects would be taken on by a very small number of existing senior officials in addition to their existing workloads and would probably not be delivered. The establishment of a dedicated project team addressed this. The CWU project manager stated that future projects will have a dedicated project administrator/manager because of the difficulties that existing staff had in finding time for the Reaching Out project, which was run by a steering group from the union’s headquarters, with a working group from the six pilot sites. Although the union had undertaken large projects before, but this was different because it involved so many departments which did not normally work together that closely and reporting mechanisms were less clearly defined – in retrospect the union should have monitored and reviewed project outcomes more closely. In ASLEF the main challenge was time management and the need for contingency planning in the project management process.

In a number of cases UMF project teams came up against suspicion and resistance to change from within the union. This was initially the case in USDAW where there was some scepticism from officers unused to running complex projects and delivering within fixed timescales. These concerns were countered through staff training and improvements in internal communication. In the CWU there were some fears amongst members that the use of IT could undermine the postal sector. In the NUT a key

UMF Round One – Self-Assessment Follow-up

challenge lay in convincing senior management to take Hearth seriously - a committee of executive members and senior officers set up to oversee the project helped to address this. Another issue was convincing national and local officers to abandon existing IT systems and to adopt the Hearth system – extensive training provision has facilitated this. In the case of the BFAWU's Membership Diversity project it was unclear how far the union would be able to rely on employer assistance and some were initially suspicious. However, the cooperation of two large national employers has encouraged other employers to become involved.

The delivery of UMF projects could also threaten existing relationships and roles within unions. In Equity the fact that the project was organised from Head Office initially caused some tensions and an element of territoriality, but the project's success and popularity with members has overcome these. In the GMB convincing some managers that race and diversity were a priority was a challenge, particularly in the context of regional autonomy and the need to ensure that consistent information was provided by the regions within the project timetable. In the TGWU the employment of staff with specific skills from outside the union was challenging since they were unfamiliar with existing and changing union structures and networks, whilst the extra work generated by the project met with some apathy and resistance. The TUC's unionprofessionals website established an online interactive resource for union officers in affiliated unions, providing a means of communication and information exchange, as well as giving access to relevant research, policies, and training opportunities and professional development. In its implementation there was initially some suspicion from unions about sharing contact lists, but this was overcome as more unions began using the unionprofessionals website.

Engagement, communication and training have been key to overcoming fear about change. In the TGWU the project worker felt that she had learnt to employ diplomacy and patience in addressing concerns arising from the implementation of the project and to encourage discussion on the issues. The lessons of the BFAWU's Membership Diversity project are now central to all the union's training programmes for officers and representatives. The translation and renewal of materials for migrant workers exposed gaps in the awareness of existing members and officers in terms of union benefits and services and this has led to a revision of materials and the union website. In USDAW the project manager felt that the way the project had been set up to be inclusive and encourage participation, along with a timetable set 'at a pace that people could work with' had been crucial to its effectiveness. Project information has been continually disseminated via an internal staff newsletter; the union's strategic plan is published every autumn and distributed to all union staff, along with a review of the previous year's progress. The union conducts a biennial staff survey and the latest results suggest widespread awareness of strategic processes.

4.4 The organisational impact

UMF Round One – Self-Assessment Follow-up

'We used to be a top down organisation - we used to gather information, do the research, and we fed that down through the chain to our members. But now because they are more confident, because they have got IT skills that they didn't have before, what they are actually doing now is that they do the research and then they email us.... so it is a two-way street now' (Project Officer, RFU).

The implementation of UMF projects has involved an examination and, in some cases, transformation of relationships within the union at both a horizontal and vertical level. In the RFU the UMF project resulted in improved communication between lay officials and their member groups, which were widely dispersed around the country. This changed the dynamic in the organisation, shifting resources to the local level and reducing the dependence upon the national office. Similarly in ASLEF the project enhanced communication with members, particularly drivers, who are not desk-based - a text messaging service has been effective in improving engagement over employment issues. New systems have improved participation since information can be put up on a members-only area of the web-site, providing an opportunity for discussion. In the NUT the Hearth project has transformed communication between lay union officers and school and college representatives within the organisation and is extensively used. The web-site is the access point for all NUT training and the union's move from paper to electronic communication has led to cost savings. In the TUC the project officer felt that the establishment of the unionprofessionals website was having a real impact;

'It is really starting to change the way we communicate with our affiliates and I think it probably helps to reduce resistance to online working. I think that's one area where some of our affiliates really needed to modernise and become comfortable with. And with the unionprofessional site it has also given them a resource as far as electronic media are concerned - not just with their specific professional area'.

In the CWU the use of technology has become standard throughout the union as a result of the project, ensuring a better use of time and resources and making the union more efficient and effective. It complements the delivery of IT training to members through the Union Learning Fund; 'there is a more ICT literate membership who expect to communicate with the union better'.

In terms of horizontal relationships, in USDAW the new management model has had an impact at every level of the union and the way that management works and performs has changed. There is now a new project management system and a strategy group that reports and advises officers on strategic issues. All staff are focussed upon the union's strategic plan through a year-round cycle of strategic planning and monitoring, which reflects all aspects of the union's performance. This goes beyond recruitment to encompass negotiated pay settlements, legal services, individual representation and membership satisfaction. At the same time membership rates have increased over the past three years and the project officer felt that the UMF project had made some contribution to this. The TGWU's Migrant Worker Support Unit provided the coordination for activities on migrant workers within the union, with a

UMF Round One – Self-Assessment Follow-up

central website, materials and information and training for officers and representatives. The project raised issues for the structures of the union in the context of its merger with Amicus, since it was a national project working across regions.

In a small number of cases the UMF projects have influenced structural change within unions. In the GMB existing structures were not effective in encouraging the participation of black and minority ethnic members and as a result of the Race and Diversity project are being dismantled. The union had a committee based structure, with separate representation for different groups within the union, but the project officer reported that 'the committee based activity simply allowed small interest groups to continue to discuss the very important issues they were affected by, but in practical terms nothing was changing'. These committees are now being combined into a national equality forum with regional representation, marking a move towards a campaigning approach in which equality is mainstreamed and there is greater engagement. In the BFAWU the Membership and Communication project informed the removal of the union's district structure as a tier of the organisation which was no longer needed following changes to the roles of some staff and officials. The project has allowed branch officers to have improved electronic access to more accurate membership data without having to go through national officers who in the past would have printed such information out and sent it through the post. Branch officers can now update membership information themselves. The new IT system means that work can be transferred electronically between offices improving administration.

4.5 Sustainability

'People don't know what you are talking about until they actually see it. This enabled us to produce something that they could see, from the pilot in Scotland they could see the value of it which is why they rolled it out through the whole of the UK ... I think we've managed to make this a key activity of the union so I don't think it will be something that will be managed by me from the Scotland office in the future' (Project Officer, Equity).

The UMF projects appear to have produced sustainable models for unions. In some cases have been extended geographically or generalised throughout different levels of the union. In Equity the UMF project was initially piloted in Scotland and Northern Ireland, but is now being rolled out nationally, whilst for the project officer proof of commitment was that the union had committed money to redesigning the website.

Other systems established through the UMF fund have also been refined and extended. In the BFAWU further UMF projects have built upon the achievements of the Round One project and three years after the project staff within the union have been fully trained to use the new system, data is continually added and directly

UMF Round One – Self-Assessment Follow-up

updated and the interrogation of the system is easier. Following the union's 'rebranding', communication with and services and information to members have continued to improve. In the RFU the project provided 'a springboard' and infrastructure from which to build a new database. Lay officials now regularly use the laptop computers purchased through the project for union work. Training has become more integral to the union overcoming the geographical dispersal of members and limited resources. For the project officer:

'The "project" has finished but what we did has changed our mindset a little bit and we continue to develop even though we are not doing it to meet the terms of the project. I think we set ourselves up in such a way that what we do now is not a big deal anymore, it's the way the organisation functions.'

In ASLEF the web-site is active and well-used and has been added to, with nearly half of the rail companies where ASLEF has members having their own sub-sites which are managed by them. The NUT, having firmly established the Hearth system, is now stabilising the system and convincing people to use it. It has linked it to a number of local networks and added a "super search" function to allow users to easily find information, its extension to local school reps is pending updated membership information. The TUC's Unionprofessionals website remains well-used and active, with new functions being introduced and training in the use of the web-site continuing. There is also training to ensure that unions can adapt the resource for their own use and for regional activities. As a result of the CWU's Reaching Out project IT training is embedded in all activist courses, as the project officer reported, 'we can honestly say that we have an almost 360⁰ communication strategy now which looks at every form of communication'.

The Round One projects have also provided a basis for further UMF and Union Learning Fund (ULF) projects. Although the T&G's Migrant Worker Support Unit no longer exists, in part because of the union's merger, the work continues through a number of campaigns involving migrant workers based upon the networks and links developed through the project. A Union Learning initiative which grew out of the UMF project is continuing. The BFAWU's Membership Diversity project has had a wider impact, influencing a large ULF project with language training built in and extended to a range of languages, whilst extending services provided, for example, assistance with money transfer. In the NUT, much of the UMF Round Two project 'Fairer Futures' is being delivered through HEARTH. In USDAW two areas identified by the UMF Round One project - management training and embedding strategic working into the organising structures – were addressed in a UMF Round Two project, extending the principles of the initial project to union officials and area organisers. In the GMB the new structures are being sustained and the project has been extended to the regions, a Round Two UMF project 'Developing Modern Management Methods' has continued to mainstream equality and diversity issues. In the course of the project it was decided to establish equality and diversity roles on a permanent basis and an equality and diversity officer was appointed before the end of the project 'to drive through the equality agenda' and ensure equality matters are mainstreamed at all times. The

UMF Round One – Self-Assessment Follow-up

project officer commented that in the past the organisation would not have dreamt of having a person in employment in that particular role’.

4.6 Cultural change

‘We eliminated all of the previous structures which basically had not given us that success that we wanted. Those structures were dismantled. We are still progressing new structures which is having a definite impact and is actually changing the culture slowly but surely of the organisation ... The campaigning structure that now exists ensures that vast amounts more people are actually engaged in the process. That’s a dramatic change in the way we did things.’”.
(Project Officer, GMB)

There is evidence that the experience of delivering UMF projects has led to cultural change within some unions – in both the internal operation of the union and also externally in changes of approach or even policy. These are often less tangible outcomes which may be an unintended consequence of the implementation of the project and it may take some time before they are fully comprehended. In terms of the former, the NUT’s project officer observed that ‘there has been a culture in unions not to talk openly about plans for fear of failing’. However, one lesson from the project was the need for transparency and to be open about achievements and failures, the project steering group set dates for delivery in the knowledge that they would be open to criticism if those targets were missed, ‘I think that’s a better thing than pretending that nothing’s happening or pretending that something has happened when it hasn’t’. The TUC’s implementation of the unionprofessionals project ‘broke down a lot of barriers’ with union officers realising that ‘by sharing knowledge everyone benefits’. The project has led not only to better contact and communication between unions, but also to working across the operational structures that all unions use; ‘It’s increased a lot of cross-union activity and it is a better use of resources’. In the BFAWU the UMF project has led to better communication and access to information at all levels of the union, but particularly between members. It has also led to a culture of engagement with lay representatives, which supports organisational change, for example gathering information on ethnicity.

There are also signs that UMF projects have influenced external policies and practices. In the TGWU the merger of the union five months into the project represented a challenge for the UMF project and highlighted the divergent cultures of the two unions. For example, whilst the TGWU provided materials in different languages, Amicus did not. The Migrant Workers project raised a number of controversial issues and difficult discussions within the union and the project officer suggested that subsequent change may be reflected in discussions on policy and strategy at union conference where the enhanced participation of migrant workers themselves would be engaging with ‘real institutional change’. Similarly in the GMB the move towards the mainstreaming of equality has emerged from the UMF project, with the new structures ensuring greater engagement.

UMF Round One – Self-Assessment Follow-up

4.7 Impact beyond the union

'The links with community organisations are still ongoing. And that's something that will always be present particularly as migrant workers become part of the union themselves because they take it on, because they are part of these community organisations and they are part of the union. A good by-product of the project is that people wanted to integrate migrant workers within the union itself and that's what happened which in turn is self-generating for a lot of the outcomes of the project'. (Project Officer, TGWU)

In some cases UMF projects have had resonance, not just within the union, but beyond; in some cases this suggests that there may be the development of a 'demonstration effect'. In the TGWU the links that the Migrant Workers Support Unit has generated with community organisations appear to be enduring. The Unit also engaged with networks on migrant workers in other unions and developed a relationship with UNISON's UMF Round Two project on migrant worker participation which enabled both projects to share information and cooperate. Similarly the BFAWU project Membership Diversity established links with the Polish community throughout Britain, but also forged relationships for the first time with employers over issues to do with migrant workers. The web-site developed by the union provides information on issues beyond work, for example on how to contact doctors, Citizens' Advice Bureaux and local community organisations. The union has also developed direct links with the foodworkers' union in Poland and through them disseminated project outcomes to European affiliates. The parallel BFAWU project led to a rebranding of the union and updating of its image, which has been reflected electronically through the web-site but also in publicity materials. In the RFU the training provided to officers gave them new IT as well as management and presentational skills that improved performance in their day jobs (they are largely in trades) as well as in their role as firefighters. It has also increased their overall confidence.

The NUT's project officer had initially considered the idea that UMF projects would be transferable to other unions 'a little naïve', however, he had subsequently informally advised other unions both in the UK and internationally on the delivery of similar interactive web-based systems. In Equity two un-branded sites based upon the union-branded web-site have been developed for employers. The GMB Race and Diversity project outcomes were disseminated throughout the Welsh and Scottish TUC's so that all their affiliated organisations were in receipt of information about the project, whilst the Welsh TUC is discussing introducing similar structural changes with a single body encompassing all equality strands.

UMF Round One – Self-Assessment Follow-up

References

Stuart, M., Martinez Lucio, M. & Charlwood, A. (2009) The Union Modernisation Fund - Round One : Final Evaluation Report, Employment Relations Research Series No. 104, London: BIS.

UMF Round One – Self-Assessment Follow-up

Annex 1

UMF Round One – Self-Assessment Follow-up Topic Guide

- Can you talk a bit about the main impact the UMF project has had?
 - did it change anything the union was doing?
 - did it change the way things were organised or managed in the union?
- Has the project continued in any form?
- Has the project been extended in any way?
 - if so how (to different regions, sectors branches, workplaces)
- Have the project outcomes been disseminated within the union?
 - at what levels?
- Did the union's senior management make or propose any changes as a result of the project?
- Have there been any changes at regional or sectoral level as a result of the project?
- Have there been any changes at branches as a result of the project?
- Did you have any problems meeting the project timetable – if so why do you think this was?
- Was the project delivered by existing staff or structures or were new staff brought in and/or new systems/units set up?
 - did this work?
 - In retrospect would you have done it differently?
- What were the challenges you faced in the management of the project and what were the lessons learnt from the process?
- In retrospect do you think the organisation of the project within the union was appropriate?

UMF Round One – Self-Assessment Follow-up

- Has there been an impact on the participation of members in the union, or any impact on organising or the recruitment of new members?
- Were there any unexpected/unanticipated learning outcomes and have these impacted in any way on union structures and processes?
 - has there been any dissemination or transfer of this knowledge within the union?