

**UNION MODERNISATION FUND –
ROUND 2 -**

UNISON : virtual branches

Case Study written by : UNISON

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UNISON Virtual Branch Project

Introduction

UNISON is Britain's largest public service union with over 1.3 million members. Our members include frontline staff and managers working full or part time in local authorities, the NHS, the police service, colleges and schools, the electricity, gas and water industries, transport and the voluntary sector.

Changing membership composition; fragmentation of employers; and declining membership participation in branch affairs has meant that the union needs a modernisation strategy that will make a transformational change in the way members can participate in union affairs. Our strategic response to this changing world of work has been to establish a network of web based branches that can target members with specific workplace information; empower members to participate in union affairs; and overcome traditional barriers to participation. The Union Modernisation Fund (UMF) funding has enabled the union to pilot these web based branch sites.

These are significant benefits for the union and its members as UNISON General Secretary Dave Prentis explains

“The UMF funding has given us an exciting opportunity to use the internet to improve the way branches communicate and interact with members. It offers branches huge scope to improve the way they communicate, consult and generally interact with members. The discussion forums allow members the opportunity to debate important local and national issues among themselves and with branch officers and reps. Overall, virtual branch sites must enhance union democracy.”

Background

Since the early eighties there have been radical changes in the way public services are delivered. Outsourcing and privatisation of public services began under Margaret Thatcher's Conservative Government with compulsory competitive tendering which evolved into a more encompassing policy of “Best Value” and “Comprehensive Performance Assessment” that encouraged local authorities to benchmark all public services against private sector comparators in terms of cost and service quality. Within health there was the Private Finance Initiative (PFI) in which private sector firms bid for contracts to finance, design, build and operate public service facilities such as new hospitals and schools. As a consequence of this

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restructuring of public services there has been a proliferation of new employers and new members for UNISON branches to organize.

There has been growing use of more flexible forms of labour in order to cut costs. This has meant a huge growth in temporary staff, contract labour and part-time workers who are being used much more widely to cover the peaks and troughs in the workload. In UNISON one in five members are part-time workers. These changes in the way public services are delivered and in the composition of the public sector workforce has led to a decline in membership participation at meetings in UNISON over the last thirty years. Ten years ago only 3 per cent of members always attended meetings and a further 8 per cent said they attended regularly. The rest were split between those that attended sometimes (34 per cent) and those who never attended (55 per cent). More recent research conducted by MORI for UNISON found participation levels in meetings had fallen as low as 1 per cent (MORI, 2007)

Web based branches

Web based branches offer a new way for members to participate in union affairs locally. There are three elements to this. Firstly, they offer members an alternative way to participate in branch affairs by creating a web site with discussion forums and on-line polls where they could debate workplace issues,

record their views and receive information that is relevant to their workplace and employer. We know that discussion forums also have the advantage in that they offer an opportunity to reduce the number of branch officer and branch committee meetings. Secondly, by moving to a web based system a branch can use electronic communication to supplement paper communication because it is cheaper and quicker. Finally, the sites might help to improve recruitment and retention rates by increasing the visibility of the union and promoting the work of the branch to staff employed by the same employer.

The Union Modernisation Fund (UMF) grant scheme has enabled us to launch this project. In 2007 we got UMF funding to pilot the use of virtual branch websites. We set up twelve websites for branches in different UNISON service groups, and a project website to provide support and co-ordination to those sites. The participating branches have a total membership of 24,000 and are shown below:

- British Waterways
- Capita
- Dumfries & Galloway Health
- Greater London Gas
- Greater Belfast Community & Voluntary
- Heddlu Dyfed-Powys Police
- Northumberland County
- Quarriers
- Shropshire County
- United Utilities Branch
- University of East Anglia

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- West Sussex Branch

Why this project?

We need to begin by explaining why membership participation is important in a trade union, what type of structure allows membership participation and how web based branches might improve membership participation.

Membership participation

The first and most important theme in this project is membership participation, which is at the heart of union democracy. It is the participation and involvement of members that is an essential ingredient for the vitality and success of a trade union. As Fairbrother points out in his book – “All Those in Favour: The Politics of Union Democracy - “..... the formal features of democratic union life are the processes of meetings, mandating and advising delegates, receiving reports back, and determining policies and union activities, such as support for campaigns and how best to pursue the implementation of union policy”. Democracy is signified by a dialogue between members and their representatives, particularly their stewards and branch officers. On this basis democracy in a union is based on the interaction between members and their representatives.

It is the processes of argument and counter-argument, discussion and disagreement, as Fairbrother points out, that are the key features of this

interaction and are a sign of the vigour and essence of union organisation. All this occurs because members’ own experiences are different and there can be different ways to proceed on policy. It is through discussion and debate that decisions are made and policies formulated. It is this form of democracy which enables members to have control of union delegates and policy. It is a view of democracy that sees participation and involvement by members as the key feature. In this manner members are actively involved in the formulation of local and national policy; in the process of local and national collective bargaining; in control of their representatives; and in the organisation and activity of the union. Although this view of participative democracy should be unexceptional, it is sobering to realise that it is rarely achieved in a union. In practice, this form of participatory democracy is the prerogative of active members who constitute only a fraction of the membership of a branch.

Union structures that allow membership participation

The branch is the basic unit of organisation in a union, which manages the administration, collective bargaining and representation of the union locally. It is through branches that members participate and become involved in union affairs; in particular with the formulation of policy and action to implement it. In order to do this, branches will

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periodically arrange membership meetings to consider the business of the branch. Alternatively, branches or stewards may hold workplaces meeting rather than branch meeting to improve attendance. Stewards are an integral part of union organisation in the workplace. They are the first layer of democratic representation in the union. In general terms the role of a steward can be broken down into two headings; firstly, collectively and individually representing the membership and bargaining on behalf of the membership with management; and secondly, communicating with the membership on behalf of the union and communicating with the union on behalf of the membership. Only one out of two workplaces has a UNISON steward

In summary then, the key principles of union democracy are a structure and organisation that enables membership participation and involvement. At a minimum, this requires locally-based branches organised around workplace stewards. But, as we have explained, these arrangements do not guarantee participation and involvement of the membership and new structures need to be found to do this. The introduction of web based branches will open another forum for members to participate in local union affairs.

A virtual or web based branch

Ward and Lusoli point out that the internet offers a trade union the opportunity to update its traditional

functions, produce efficiency gains and market themselves to potential members (Ward & Lusoli, 2002). They can do this by creation of a branch website that is used as an information storehouse containing organisational, personnel, policy documents and regular news releases. The website offers the opportunity of efficiency gains through reducing the pressures on branch officers to respond to telephone and postal queries. But it is not simply administrative gains that the website offers; it is also the opportunity to provide a range of online services for members. These need not be primarily commercial services but can be professional services such as assistance when members have a problem or query. The website can, however, provide access to a range of financial and membership services such as house insurance and holidays that the union offers.

It can in the third place be used to target and recruit new members. The idea is two- fold; firstly one can volunteer or join the branch from the comfort of your own home at the click of a button using an online joining service and, secondly, the branch can market the union to non-union members in the same workplace. Finally, and perhaps most importantly, the branch website can be used to mobilise branch members, foster local campaigns and democratise the branch. The idea is that the establishment of the branch website with online discussion forums enhances individual members'

abilities to influence branch officers' decisions and hold them accountable. The website offers members more frequent and direct access to branch officers to communicate their opinions on policy matters and organisational structure. It provides members with more and up to date information on what branch officers are doing and thereby help to promote greater accountability. And just as it lowers costs, it also enables non-traditional participants like part-time workers to participate. Similarly, the website allows inputs from those who find it difficult to attend branch meetings such as members with childcare responsibilities.

“A virtual branch allows us to put out new information to the members everyday if we need to. It is a much more effective way of communicating with them than circulating a newsletter that often fails to reach the members”

Emma Taylor, UNISON branch administrator and manager of the West Sussex site

A virtual branch utilises a website as its hub, but is not simply a web presence. It employs new communications to assist with organising in a modern way by providing:

- Discussion forums to allow members to inform branch decision making
- Data collection forms to allow members to interact with their branch at times that are

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convenient for them

- Email to members providing swift communication and updates to members
- Access to parts of the website for members only
- Non technical content editing to allow activists to run and update the site.

It is also possible, subject to constitutional review, to have online polls that offer quick and efficient means for consultation on local issues

“Engagement is the key and I believe that we need to use a whole range of methods from the personal to the virtual to effectively engage with our membership and community.”

Sean MacBradaigh, Branch Secretary

Methodology

The project was delivered in partnership with APT Solutions, web site designers. A project team was set up to oversee the development and delivery of the web sites and to ensure that the project stayed on track and its milestones were achieved. As part of the bid we got funding for a temporary post of Project Support Officer whose role was to deliver training on how to use of the web sites and to assist with their operation.

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Choice of branches

Branches were chosen to reflect the composition of UNISON; more specifically they were chosen according to the following criteria: service group; region; employer and UNISON density.

Project Support Site

At the outset of the project a virtual branch was set up to include the participants in the project. This virtual branch (www.virtualunison.org.uk) was established as a support resource for the site users. It hosted training material and was used to issue information out to all the sites. The support site was also established as an example to the participating sites, so that the project would utilise the same methods as they were being asked to. This allowed the project to involve the site editors and teams in online discussions regarding the project and to hold an online conference in the summer of 2009. It took place over a four week period with a total of 32 participants and addressed different topics each week. Regular emails were sent out from the support site to update participants and invite others to join the conference. The conference proved an excellent medium for the branches to express their views about the progress of the project.

Key success measures

For evaluation purposes a set of success measures were agreed:

- Membership participation- Membership participation is defined as either attendance at a union meeting in the past twelve months or visiting the branch virtual website. In the first participation survey conducted in 2008 we found that the participation rate of those attending branch meetings was 12 per cent. We thus agreed that participation levels in excess of 12 per cent of the membership as a success criterion (Before conducting the survey we had arbitrarily set the participation criterion at 10 per cent). As we discussed earlier participation can involve a dialogue with colleagues, whether members or representatives, so participation in the discussion forums is relevant measure of success.
- Recruitment -Each branch should exceed the annual membership growth of the union which is 3 per cent.
- Retention -Each branch should achieve a reduction in the number of members leaving the union
- Cost savings -Each branch should make savings by reducing the number of meetings and by spending less on publications like the branch newsletter
- Routine inquiries -Each branch should achieve a reduction in the number of routine inquiries to the branch secretary

IT development

Social Change Online, an Australian IT company, successfully bid for the

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contract to provide the websites for the project. They had previously built similar sites for two UNISON branches. The company was taken over by a UK company, APT Solutions, shortly after the project began and the new company made significant software changes to the sites. The changes were made following a review of the software that took into account the low level of participation in discussion forums. As a consequence there was serious slippage in our schedule as the company developed

and tested the new software. The slippage was managed by moving to a phased implementation of the sites. The initial launch date for all sites was July 2008, but was replaced with a phased launch over the period July 2008 to April 2009. Most of the sites were launched in early 2009 and were all fully operational during the monitoring period April to December 2009. The work on the new software for the forums was completed in the spring of 2010.

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Early outcomes*Members views about the sites*

We commissioned a survey to find out whether members were using the virtual sites and what they thought about them. We were surprised to find that only 24 per cent of members knew about the sites and that only 43 per cent of those that knew about the site reported using them. Members using a site were asked what they thought about the design. Just

under two fifths (37 per cent) of members said it was either very good or good and only a tenth (9 per cent) said it was either very bad or bad. Members were also asked about the features of the site. The results are reported in the table below. A majority of users said the site was easy to use (67 per cent); information was easy to find (56 per cent) and that they readily understood the information (64 per cent). Just under a half said the information on the site was up to date (48 per cent) and interesting (49 per cent).

How do members rate the features of the site?

	Very good %	Good %	Intermediate %	Weak %	Very weak %
Ease of use	12	55	23	9	1
Ease of finding information	5.5	50	35.5	7	2
Ease of understanding the information	11	53	29	4	3
Extent to which information is up to date	9	39	39	10	3
Interest of the information	8	41	40	9	2

Of the members who knew about the sites but did not use them, just over a third (35 per cent) preferred face to face contact. It should be noted that the function of the virtual branch site is to supplement rather than replace existing forms of communication. Face to face contact between reps, branch officers and members will continue after the creation of the virtual branch site. Just under a fifth (17 per cent) did not know how to use the sites. Of the rest (38 per cent) were either not interested in the sites (22 per cent) or did not know how to use computers (7 per cent) or did not have internet access (9 per cent).

We were keen to find out what would encourage members to use the sites. The one factor dominating all others, not surprisingly, was the relevance of the information on the site to users. Over two-fifths (43 per cent) of users would like information on the site that was of interest to them. Just under a quarter (24 per cent) want the site made easier to use. And the rest were split between those members asking for more up to date information (12 per cent) and others asking for more interesting information (13 per cent).

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Membership participation

We define membership participation as attending a union meeting or visiting a virtual branch web site. In order to gauge the level of membership participation we commissioned a survey of all the members of the participating branches at the start of the project in 2008¹. We found that 12 per cent of members had attended a union meeting in the previous twelve months. Of these members, just over half (53%) said they had been to one meeting in the past year and just under a fifth (19%) had been to two meetings. At the other end of the scale 3 per cent said they had been to ten meetings in the past twelve months and they were most likely to be union representatives.

In the autumn of 2009 we commissioned a further survey of all the members of the participating branches to find out if membership participation levels had changed following the introduction of virtual branch websites². To begin with 14 per cent of members said they had attended a union meeting in the past twelve months. Of these members, under half (46%) said they had been to one meeting. At

the other end of the scale 4 per cent said they had been to ten meetings. Another 6 per cent said they had visited their branch virtual website, but had not been to a union meeting in the previous twelve months³. Of those visiting the virtual websites, one fifth of members (22%) visited their site at least once a week and just over half (52%) said they visited the site at least once a month. Overall, 20 per cent of members in the survey had either attended a union meeting or visited their branch virtual website in the previous twelve months. This is a rise of 8 per cent in membership participation levels between the two surveys, which suggests that the virtual sites have had a positive effect on membership involvement in union affairs.

¹ A total of 18,616 survey forms were mailed out to members whose addresses we had. The response rate to the survey was 12 per cent.

² A total of 23,572 survey forms were mailed out to members and we had a response rate of 8 per cent.

³ The survey threw up a surprising finding, which was that only one in four respondents said they knew about their branch virtual website.

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To see if there is a correlation between degrees of participation and the virtual branch sites, we categorized the respondents to the second survey as either:

- a) A member who had done nothing with UNISON in the past (17 per cent); or
- b) A member who reads the branch newsletter or reads U magazine or regularly talks about UNISON with work colleagues (66 per cent); or
- c) A member who regularly attends union meetings or distributes UNISON materials and/or holds a representative position in UNISON (17 per cent)

In category (a), the non-participant, 1.75 per cent of them visited their branch virtual site. In category (b), the part-time participant, and in category (c), the full-time participants, 5 per cent and 21 per cent of them respectively visited the sites. We can draw two conclusions from the analysis; firstly there is a correlation between the member's level of participation in the branch and their use of the virtual web site and perhaps, more importantly, the virtual web site encourages a small proportion of the non-participants to become part-time participants by reading what is on these sites. Moreover, when asked to rate the virtual site according to ease of use; ease of finding information; ease of understanding information; interest of information and finally the extent to which information was

up to date, these former non-participants universally reported these characteristics as good.

Union democracy is about membership participation and decision making. All the sites organized discussion forums where members expressed their views about workplace issues and other relevant matters, but in practice, few members participated in the discussion forums. A total of 360 members visited the forums and 116 posted messages. Part of the explanation for this maybe the failure on the part of branches to regularly up-date the sites with relevant information, providing no opportunity for members to comment. But it may also be that members do not participate in on-line activities like chat sites, newsgroups and other discussion forums. In a report on Internet access the Office of National Statistics reported that 40 per cent of users were posting messages to on-line forums. Of these participants, young people (16-24 years old; 71%) post more messages than older people (45-54 years old; 25%). We might therefore reasonably conclude that participation in discussion forums by UNISON members, whose average age is 48 years old, is unlikely given the relatively low participation by older internet users in other types of forums

Recruitment

It has not been possible to show a direct correlation between

recruitment rate and the introduction of a virtual branch site because there are too many intervening factors that influence the recruitment performance of a branch. Of these factors four dominate: employer re-organisation, redundancies, inaccurate membership records and commitment of reps to organising.

Retention

Similarly, it has not been possible to show a correlation between the rate at which members leave a branch and the introduction of a virtual branch site because of intervening factors that affect retention of members. The factors affecting retention are broadly similar to those that affect recruitment: employer re-organisation, redundancies and inaccurate membership records and commitment of reps to organising.

Cost saving

Three areas were identified where savings might be made: communication with members; meetings; and member enquiries.

1. Communication

Traditionally branches communicate with members by regular newsletters that involve printing and dispatching of paper copy. Other forms of paper communication with members include circulars, and booklets.

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Overall, the branches in the project estimate £11,000 of savings have been made using the virtual sites to communicate with members.

Examples of savings include:

- West Sussex branch saved £1,800 by publishing the branch newsletter on-line;
- Shropshire General branch saved £4,000 by publishing a members' booklet on-line.
- British Waterways made savings by issuing all branch circulars on-line

“Communication is an aspect of branch work where we can both make savings and provide more up to date information to members about what is happening locally and nationally. We can do this by putting the news directly on to the site which saves money on printing and postage of newsletters and saves substantial amounts of a branch secretary’s time”

Dilys Williams, project manager

2. Meetings

Two areas where savings might occur were branch officers meetings and branch committee meetings (A branch committee in a small branch will consist of its stewards, health and safety representatives, learning representatives and its core branch officers). These meetings could be held on-line using a discussion forum on a virtual site, but none of the branches took up this option.

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Member enquiries

All the sites had a section with “frequently asked questions”, which was meant to reduce the work load on branch secretaries. In practice, members mostly preferred to contact the branch secretary by email or telephone with the query rather than use the web site. It was not possible to measure accurately the volume of enquiries before and after the launch of the sites. However, as only a quarter of members knew about the web site, it is too early to assess the effectiveness of this approach.

3. Discussion

Of the five key success measures examined in this project there was a change in membership participation and some cost savings. This is heartening in one important respect; a minority of members (6 per cent) who do not attend union meetings sought information about union activities from their virtual branch web site. Moreover, as only a minority of branch members (25 per cent) said they knew about the virtual web sites, we might reasonably conclude more members would visit the web sites if they were aware of them. Overall, 20 per cent of members in the survey had either attended a union meeting or visited their branch virtual website in the previous twelve months. This is a rise of 8 per cent in membership participation levels between the two surveys, which suggests that the virtual sites have

had a positive effect on membership involvement in union affairs. We therefore met one of the key success measures, namely 12 per cent of members should participate in branch affairs. There was also evidence that members who had not previously participated in any kind of union activities did visit the web sites. The virtual web sites appear to encourage a small proportion of these non-participants to become part-time participants by reading what is on these sites.

Membership participation is also about discussion and debate. All the sites had discussion forums where members could express their views about workplace issues, but only a handful of members participated in them. Part of the explanation for this is the failure to regularly up-date the sites with relevant information, providing no opportunity for members to comment. But, as we said earlier in the report, it may also be that UNISON members do not participate in on-line activities like chat sites, newsgroups and other discussion forums.

It has not been possible to show a correlation between recruitment and retention performance and the virtual branch sites. We found too many other factors – employer re-organizations, inaccurate membership records, compulsory redundancies and commitment of reps to organising – were influencing the performance of the branches in these areas. Nor has it

been possible to show that branches could make significant cost savings in two key areas of their activities; communications, and meetings. There was, in fact, only evidence to suggest savings might be made in communications with members.

In this project we were expecting branches to perform a major cultural change in the way in which they operate and should not be surprised that progress has not been as rapid as we would like it to have been. On the one hand it is heartening to find membership participation has risen but, on the other hand, it is disappointing that progress was not made on other aspects of the project. In the next section we discuss how we are addressing these issues.

Lessons learnt

- As a result of the project we learnt a number of important lessons:
- All branches that request a virtual site should attend an Organising Virtually training course. As part of the course the branch should draft a plan for managing and organising their new virtual branch.
- It is important to emphasise that the virtual site does not replace the branch but enhances and supports it as a tool for organising and recruitment.
- The branch should appoint a site manager

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- All software costs and requirements should be agreed with the supplier at the start of the project
- During the set up period there should be a system for monitoring the software costs.
- A branch training programme should be agreed at the start of the project. The programme should cover all aspects of the site including setting up, usage and maintenance of the site
- The virtual branch is an opportunity to enhance the IT skills of branch officials and representatives.
- Maintenance of the site should be a standing item on the agenda of branch executive agenda
- Regional staff responsible for branches with virtual sites will benefit from attending the Organising Virtually training course

Next steps

Organising training

Although the virtual sites had been operating fully for eight months it was evident that branches and work groups required additional support to realise the full potential of their virtual sites. The Organising Virtually Toolkit Training module

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was developed, in consultation with our Learning and Organising Services, to enable a greater understanding of how a web based site can be used as a tool to organise, recruit and campaign, and to encourage branches to think about how they can do their current work on the virtual site to save time and money.

We will target the training at branch officers including branch secretaries, and communication officers as well as branch employed staff. In addition, we will try to include young members and other activists. The course activities will encourage them to think, where possible, about shifting from traditional paper based methods, to virtual paperless ones. For example, to think about how the branch currently communicates with the members and whether this can be done virtually.

At the end of a session a plan will be agreed setting out what each branch or group needs to do to fully adopt the virtual approach, and who will do it.. The plan should be included as a standing item at branch or group meetings. Use of the virtual branch as well as progress against the plan will need to become part of the day to day work on behalf of members

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