

USING DATA TO BUILD STRONG UNIONS

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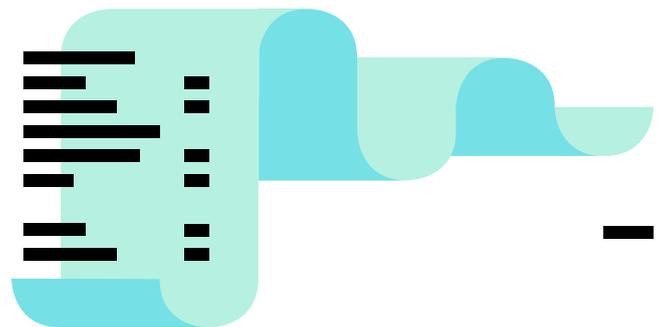
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Contents

Executive summary	4
Introduction: why does data matter for unions?	5
1: What is data?	7
Data gives us information, and we're all using it	8
Where to start? It begins with purpose	11
2: How unions can use data effectively	13
Understanding and questioning 'the union way'	13
The union way 2.0 – driven by data	14
1. Clear strategic aims and an understanding of what information is needed to meet them	15
2. Investment in union wide data and research skills as well as specialists	18
3. A culture of sharing data and information	22
4. Outcomes-focused technology and systems	25
5. Putting the user first	28
6. Learning from data to make evidence-based decisions	32
3: Data-driven decision making	35
Scenario 1: Preventing job losses	36
Scenario 2: Recruiting a new group of workers	38
Scenario 3: Reviewing the membership model	40
Scenario 4: Planning a priority campaign	42
Scenario 5: Exploring a potential merger	44

Executive summary

- Huge opportunities exist for trade unions to use data to help build stronger, more successful unions and win a better deal for workers.
- Data is often presented as a 'new' thing – it's not. Data provides information to help make decisions. It's relevant to the work of everyone in unions because unions use it every day and always have done. But today there are new ways to gather, analyse and use data that unions can do more to exploit to make their work more effective.
- But what does using data mean? How should unions be thinking about data? What even is data? This report addresses those questions. It provides practical examples, ideas and questions to help unions enhance how they already use data.
- The report presents findings from research about how data is being used in unions and the barriers preventing its use. Often there is a lack of clarity about what data is and its often seen as 'operational' not 'strategic'.
- To use data effectively requires putting strategy before tactics. It requires focusing first on purpose and not technology and putting why before how. Unions with clear strategic aims and clarity of purpose can assess what information they need to help meet their aims and what evidence is needed to make their case. Data can provide unions with that information.
- Many officials cited that they wanted their union to be 'data-driven' but there wasn't consistency on what that meant. The report sets out the elements of what a data-driven union would look like and steps for all unions to take, whatever their size and resources, to make them a reality. It also provides practical examples to show how data-driven unions would respond to real scenarios and make decisions that are informed by data.
- Becoming data-driven organisations will require new training to help people gain new knowledge and skills to use and understand data, upgrading IT systems and establishing a culture of research and analysis that values data. This will take time but the report offers ideas to help get the ball rolling, nudge it along and build momentum.
- The report aims to be a guide for senior leaders and elected officials as they make decisions about how to use and invest in data; a resource for officials and activists who want to improve their understanding about data and gain ideas to help their work, and a tool for strong data advocates in unions to use as they encourage and make the case for greater data use.



Introduction: why does data matter for unions?

From the TV and music we stream to what we buy (or don't buy) or how many steps we take, we are increasingly aware of the many ways that our daily lives are a source of data and how it is being captured.

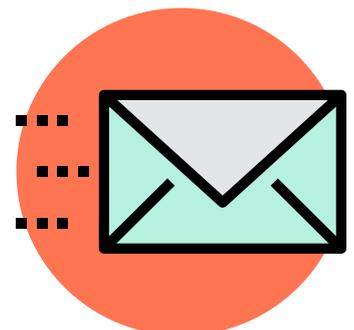
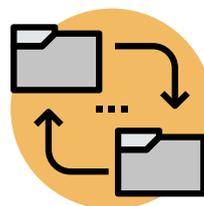
Data can provide new understanding about our lives and is being used to shape the services that we use and subscribe to. Many of us like and want to get personalised services tailored according to our preferences. Moreover, we increasingly expect services to respond and adapt to how we engage with them, whether that's public services or those we pay for. We're also becoming far more aware of how employers are collecting and using data at work (such as via wearable tech, monitoring software on computers, or the automation of customer-facing roles) and how it can change our jobs.

All of this means that data has the potential to make our lives – including our working lives, increasingly individualised. This isn't necessarily a bad thing. Person-centric services can empower and better support our individual needs. An example of this is in healthcare where our views and actions can inform the development of more efficient, more responsive and better quality services. But individualisation also risks fragmentation, atomisation and disempowerment.

For unions, which exist to bring workers together to collectively achieve change, this poses new questions. In an increasingly person-centric world underpinned by data will it be harder to bring people together to change work? Will it be harder to convince people that it's better to do things together than by themselves?

Yet whilst there may be new challenges for unions there are also new opportunities. If data is increasingly being used to shape and understand our lives, including our working lives, can unions use data to their advantage? Can unions use data to help identify new connections between people and bring people together? Can data help unions win a better deal for workers and build stronger, more successful unions? If so, are unions making best use of the data they hold and other available sources of data? If not, how can they do this and use data more effectively? *What does using data even mean?*

Unions 21 undertook this research to investigate those questions. The project explored how unions are currently using and thinking about data and how they can maximise the opportunities it provides. Those opportunities could include gaining new information on the opinions, expectations and experiences of their members and potential members about their jobs – but also what they think about unions too. Data collection that is member-centric can increase member activism and voice and help to ensure the union is meeting the priorities of its members. Opportunities



could also include gaining new insights about the workplace conditions and challenges experienced by their members and then using that information in campaigns and negotiations. As one senior leader explained, by gaining better quality data and having a more analytical focus, their union will be “able to match employers better”.

The research found that all unions are on the path to using data more effectively but coming from very different places. Some have invested in new systems to help improve their use of data, others know they need to. Regardless of where a union is on its path, this report aims to be a practical and accessible tool to help them move further along. It makes suggestions and asks questions for unions to consider which are all shaped by learning about work that is already happening in unions. That work shows how unions can use data to recruit and retain members; convert members into activists and workplace reps; improve their management and governance, and ultimately to enable workers to have greater voice and influence to win a better deal at work. Sharing data with members can also enable them to use it to organise with their colleagues in their workplaces.

That’s why the report is not just for people in unions who do ‘data’ in their roles but offers practical ideas and insights for union officials in all roles (senior leaders, paid staff, elected officials and workplace representatives) and regardless of the extent they currently use data in their work.

The research found that for some people using data can be intimidating and overwhelming. It can be difficult to know what to do and how to start. So it provides examples, case studies and ideas to help people who are currently unsure about how to use data, and to help support the work of people who are confident in using data and want to help more of their colleagues to be too.

Importantly, the focus of the report is not on which digital technologies are the right ones for unions to use. Instead, it focuses on questions that each union can usefully think about which will help them to establish the systems, structures and technologies that are right for them and that will help them to meet their different aims and needs. They will be different for large and smaller unions,

and for unions that mainly represent workers in the private sector, compared to those representing public sector workers.

The research took place in late 2021. It comprised in-depth interviews and roundtable discussions with union officials with a wide range of roles, responsibilities and seniority, as well as a short survey for officials. It identified a clear recognition among participants that it would be positive for their union’s work to be ‘driven by data’ and a strong consensus that unions can and should use data more effectively in their work. It found there is often a lack of clarity about what data is and how its use is seen as operational and not strategic. Officials also reported that more widespread use of data can be held back by poor quality data, people’s unfamiliarity with interpreting data and internal systems that are seen to be substandard. Data can help unions to develop and implement their strategic plans, but participants described how this will require a cultural shift and the investment of time and resources. Using data to improve a union’s effectiveness may challenge long-established ways of doing things.

- **Part One** looks at what data is and how unions should think about it.
- **Part Two** looks at how unions can use data; what a ‘data-driven’ union would look like and steps unions could take to establish a culture that encourages and supports people to use data. It looks at why there can, understandably, be reluctance and inertia within unions about using data. It shares examples, case studies and questions to help overcome this and embed systems and structures that enable more effective use of data.
- **Part Three** shows how data-driven unions would approach a series of imagined scenarios and make decisions that are informed by data.

1: What is data?

Every week new articles appear that excitedly describe how data is and will 'transform' and 'revolutionise' work for the better. Often, and at times unhelpfully, data is discussed alongside digital technologies in debates about the 'future of work' or the 'changing world of work' (debates that too often ignore the fact that for many people the problem is that their present work isn't changing fast enough). All of this can lead discussions about data within unions and workplaces to be operational and not strategic, to be technology-led and to focus in-depth on the benefits of certain digital technologies over others. It can create a confusing and off-putting picture which can suggest that the whole issue of data is best left to data experts or IT specialists to deal with. That is far from the case: data is relevant to the work of everyone in unions.

There is a strong consensus among union officials that unions can and should be using data more effectively in their work. However, there was also the view that there are two major barriers that limit its use: *a lack of clarity about what data is and a lack of familiarity with how it could be used.*

Without data being understood and thought about in the right way it will be hard for it to be used to its full potential. Or to put it another way, if we were to dive right in and look straight away at how data can be used and focus on tech, we fall into the same trap of ignoring the purpose of using data. As one official put it, *'strategy always needs to come before tactics'*.



Data gives us information, and we're all using it

Regardless of their union, specific role, responsibilities or seniority, the conversations with officials about their work got to the heart of why unions exist and why officials do their jobs. They can be summarised as:

- Are we [the union] meeting the challenges that workers face at work?
- How can we help workers to have greater voice and influence at work?
- How well do we understand the workplaces and jobs of our members and of potential members?
- Can we improve our offer to members and to non-members?
- How can we most effectively allocate and strengthen our resources?

These questions and challenges are not new. Unions were focused on meeting them 10 years ago and 100 years ago. By identifying the challenges that unions are seeking to meet the next step is ask:

- To meet that challenge, what do we need to know? What don't we know?
- What arguments will we need to make to persuade people of our case?
- What evidence will we need to make our case (and what evidence are we currently using to make our case)?
- How can we find out what we need to know?
- And how are we then going to make decisions based on our evidence?

On the face of it, these questions may not appear to be about data. But answering them requires information and that is what data provides: **data gives us information we need to make the right decisions.**

Data is individual facts, figures, records and statistics that have been collected. It is not just numerical and nor does its existence or creation necessarily rely on digital technologies. There is not one homogenous thing called 'data' but lots of sources and types of data. **Analysing data gives us information. It helps us to allocate the right resources at the right time for the right purpose.**

Table 1 provides an overview of the types of data that unions hold and could make use of. As you can see, this is not only data generated by the unions but also external data that could be gathered from other sources.

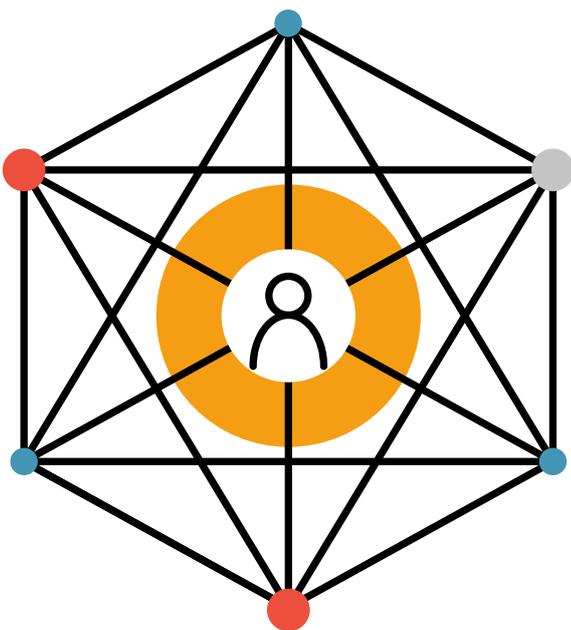


Table 1: Examples of data relevant for trade unions

INTERNAL DATA (produced, stored or commissioned within unions)	EXTERNAL DATA (originating outside of individual unions)
<p>Membership data</p> <ul style="list-style-type: none"> • Membership density • Membership demographics Recruitment and leavers data (eg volume, reasons for joining/ leaving) • Contact details (eg. Percentage contactable by email) • Member contact data (method of communication; reason for contact; satisfaction with service provided; outcomes) <p>Digital analytical data</p> <ul style="list-style-type: none"> • Website analytics (eg. Page views; time spent on pages; clicks; Search Engine Optimization (SEO) data) • Social media engagement data • Email analytics (eg. Open rates) <p>Financial data</p> <ul style="list-style-type: none"> • Management accounts <p>Training data</p> <ul style="list-style-type: none"> • Course evaluations • Participant records • Learning outcomes <p>Industrial relations data</p> <ul style="list-style-type: none"> • Pay agreements • Recognition agreements including access arrangements • Industrial action outcomes • Dispute ballot outcomes <p style="text-align: right;"><i>continued</i></p>	<p>Employer data</p> <ul style="list-style-type: none"> • Company accounts • Company annual reports and other official reports • Company contacts and supply chain data (eg suppliers and subcontractors) • Information provided to the union during bargaining negotiations <p>Research data</p> <ul style="list-style-type: none"> • Research on industrial change (eg. Projected future changes in industrial and workforce composition) • Research by other unions, the TUC and other confederations • Thinktank research • Academic research • Polling data • Long run behavioural surveys (eg Understanding Society, British Household Panel Survey) <p>Economic and social data</p> <ul style="list-style-type: none"> • Office for National Statistics (eg data on inflation, wages, trade, population trends, health, employment, education) • Bank of England economic data • Data on consumer trends (eg spending patterns) • Recruitment data from employers and employer associations (eg number of vacancies, pay rates, recruitment trends) <p style="text-align: right;"><i>continued</i></p>

Table 1: Examples of data relevant for trade unions *continued*

INTERNAL DATA (produced, stored or commissioned within unions) <i>continued</i>	EXTERNAL DATA (originating outside of individual unions) <i>continued</i>
<p>HR data</p> <ul style="list-style-type: none"> • Recruitment data (eg. Applicants) • Staff progression data • Sickness/absence data • Time survey data • Minutes of meetings • Skills audits • Staff demographics <p>Member surveys</p> <ul style="list-style-type: none"> • Results of surveys • Records of surveys sent • Net Promoter Scores <p>Casework data</p> <ul style="list-style-type: none"> • Themes; Outcomes; Volume <p>Records about reps</p> <ul style="list-style-type: none"> • Mapping locations • Progression • Outcomes of cases dealt with • Demographics of reps <p>Internally produced research</p> <ul style="list-style-type: none"> • Research dossiers on employers • Polling and focus group data <p>Guides to useful data sources and reading lists</p>	<p>Government data and reports</p> <ul style="list-style-type: none"> • Data from government departments and relevant state bodies (eg. Low Pay Commission, GLAA, Health and Safety Executive). <p>Industry body data</p> <ul style="list-style-type: none"> • Reports, statistics, economic forecasts <p>Trade union solicitors</p> <ul style="list-style-type: none"> • Information about member cases (eg. Types of case, volume, outcomes) <p>Legal records</p> <ul style="list-style-type: none"> • Court rulings • Tribunal rulings <p>Freedom of Information data</p>

As Table 1 shows there is no part of a union's work that does not involve using data in some form, yet this is not a recognition shared by everyone in unions. On several occasions people expressed that they had initially been unsure that they could contribute to the research before realising that they could. A view expressed by an official in one roundtable discussion sums this up:

"I had a look at the survey you're doing yesterday and I'm thinking I don't use data. Now just listening to what colleagues have said, I'm thinking, actually, yeah, we do."

Unions will benefit if there is wider understanding about what data is and how it gives us information. As life becomes increasingly digitised, it is easy to overly focus on new digital technologies. And while it is true that there are now many ways to collect, analyse and use data, we cannot forget that using data is what unions have always done. Remembering this will help to show how 'using data' is or can become an everyday part of people's work; a means to help them perform their roles and meet the aims of the union.



Where to start? It begins with purpose

For unions to gain the most in their data use, the conversation needs to start with clarity on the purpose and aims of the organisation: a focus on those fundamental questions about why unions exist and the challenges they exist to meet. From this starting point the union can be clear about what information is needed to inform decisions and how that information can be used.

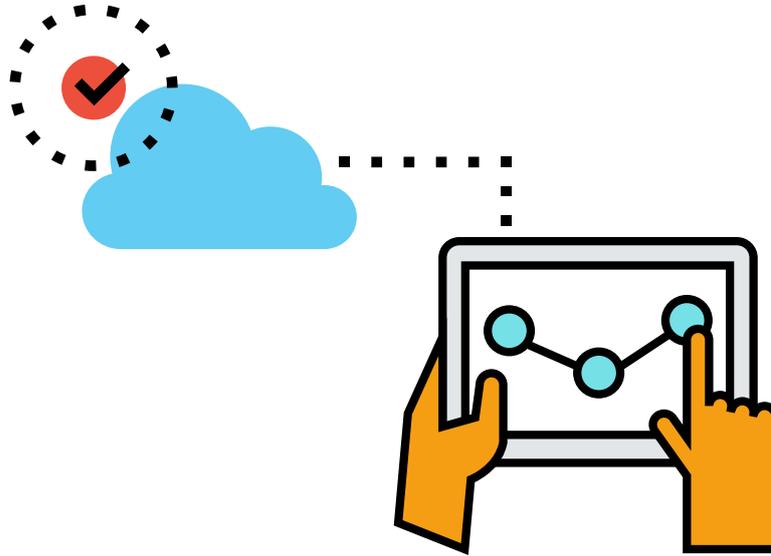
To give one example, a senior leader described how they had recently requested data on the rate of people returning to workplaces after lockdowns in the sectors they organise in. They wanted this data not just to gain a better understanding of the current challenges facing members but to be more informed about the potential long-term implications for the union's strategic aim to build density in those sectors. What changes to organising practices will be needed if fewer people are in traditional workplaces? What changes will need to be negotiated to access agreements with

KEY DATA DEFINITIONS

Data governance: a framework and a set of practices to establish and meet an organisation's needs. Data governance helps organisations to work out what information they need to meet their aims and then what infrastructure is needed to make this possible.

Data infrastructure: a collective term to describe an organisation's systems that hold and use data; the *standards* and *policies* it has in place to manage data, and the people and *technologies* that use and contribute to those systems, standards and policies.

Data literacy: a term that describes an ability to think critically about data; to understand what it is and how it can provide information, and understand why and how data is collected, analysed, used and shared.



employers? Will flexible working and fewer in-person interactions between colleagues change people's expectations of their jobs and of unions? What happens to the concept of the picket line and the workplace rep when more people work remotely?

Data helps to answer these questions, but to get the most out of it, the union needs to be clear about why the information is needed. This ensures that not only are the right questions being asked, but the right data is being gathered to enable the union to meet its aims. It also means the right data governance arrangements can be put in place.

The work to determine and clarify a union's strategic aims requires a 'whole union' approach with input from members, colleagues in HR, finance, comms and industrial roles, as well as those in union data and IT roles, and in senior 'traditional' decision making roles. External expert perspectives can be incredibly valuable to help facilitate this work, but in order to be successful, it needs to be shaped and led by those who know and understand the union best. This is not work that starts from the perspective of first trying to fulfil the tech needs of the union. That comes later. Without being clear on its aims, unions are at risk of being sold new IT systems and software that don't meet their needs (or remaining stuck with old ones) and are at risk of being locked into suppliers and contracts that don't provide good service or value for money.

This isn't to suggest that by having clear aims and through greater understanding about what data is

unions will embrace data and transform how they work. Helping colleagues to use data more and to make more effective use of data will take time and is likely to require organisational change and new investments to be made, as described in Part Two. But by starting with an understanding that data is a means to an end and that it provides information that can help to meet strategic aims, unions will be in a better place to make the necessary changes and to enable them to use data more effectively. Understood in this way data can become integral to unions' strategic aims and to their operational activity with each team and person having responsibility for its use.

KEY POINTS

- **Data is individual facts, figures, records and statistics that have been collected. Analysing data gives us information to make decisions. It helps unions to allocate the right resources at the right time for the right purpose.**
- **Unions hold lots of data and many people already use it in their work, often without realising it.**
- **Effective use of data begins with clarity of purpose. The key question to ask when it comes to using data is always 'what aims are we trying to achieve?'**

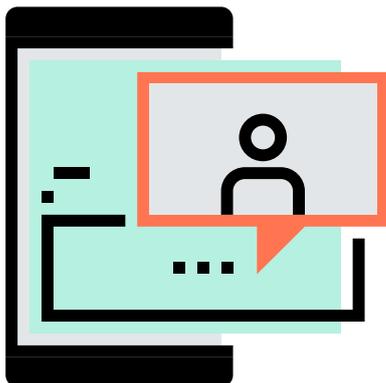
2: How unions can use data effectively

On occasions, when speaking to officials about how data is used in the union and how to encourage greater use, the old joke about the lost tourist who asks a local farmer for directions came to mind. The farmer replies: *'Well, if I were you, I wouldn't start from here'*.

Unions are not new start-ups setting out with a blank sheet of paper but long-established member-led organisations with democratic structures, deep institutional memories and long-standing traditions and ways of working. There is a lot of benefit in this. However, existing practices and systems can reflect the institutional need from another time and persist because people learn how to navigate them and make them work for the here and now. This lack of adaptation makes it harder for unions to understand data but also to use it effectively.

Understanding and questioning 'the union way'

Officials who advocated for their union to use data more effectively often spoke about the need for a cultural shift if data is to be used more widely. They cited two barriers that reinforce each other: the 'union way' of doing things and an unfamiliarity that some colleagues have about data.



The concept of the 'union way' was seen as a problem across the board, not in any one union or department. It can be summarised as a reliance on doing things as they've always been done and an acceptance that this is how things are done. One person summed this up in their description of the culture they felt needed to be changed:

"I think that a lot of the time people just operate on an operational day-to-day basis rather than learning from things. And [so] how do we make this better going forwards? It's like, this is how we've always done it, so we'll just carry on doing this."

It was recognised (and understood) that this often comes from an unfamiliarity about what data is, what its purpose is and how to use it. More specifically, officials described how the union way can mean a tendency to use anecdotal evidence rather than evidence from systematic data-gathering; a reliance on 'instinct' and winning arguments through force of personality; how an 'activist focus' can lead to the views and experiences of a minority being privileged over information that could be gathered from a more silent and often more diverse majority of members; a culture of not always recording and sharing information; and a reliance on having to know who to speak to if you want to get information about certain topics or access sources of information.

Whilst these issues and the idea of the 'union way' can feature in all parts of unions' work, data brings them to the fore. A mindset of valuing data and wanting to be guided by it encourages people to

scrutinise the status quo. It encourages seeking new information to test, evaluate and learn so that practices and systems can be improved and made more effective.

Data doesn't provide certainty, it just gives us information to make decisions. That is why unions' long-standing values, traditions and institutional memories should be seen as a help, not a hindrance. They enable us to view data through the eyes of trade unionists, to put it in context and assess what information it provides, and to make decisions as trade unionists based on that information.

The examples discussed below show how their work is beginning to establish a new culture of using data in unions. Perhaps what we might describe as the union way 2.0.

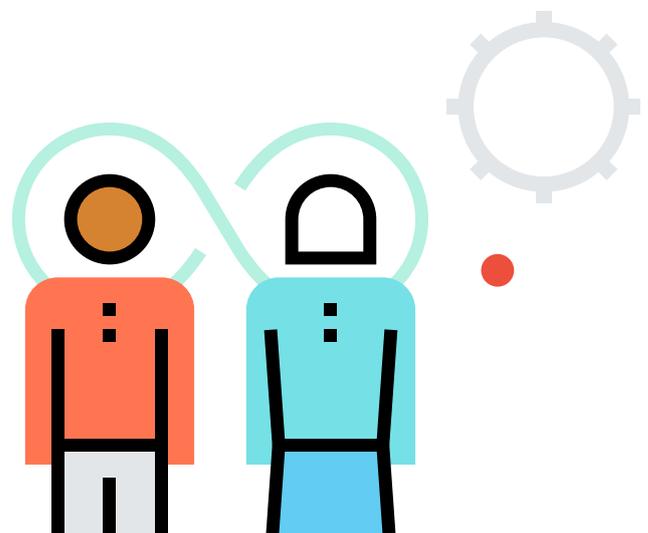
The union way 2.0 – driven by data

Across unions and roles, those who contributed to the research often stated an aspiration for their union's work to be 'driven by data'. What, however, does this really mean to a union, and what might it look like in practice? Through the discussions and examples provided by unions, we can see that **a data-driven union is one where the use of data is normalised and embedded in the everyday practices of people's roles; built in rather than bolted on**. It would have an internal culture at all levels of the union where the use of data is encouraged and where people are supported to

learn how to use data, where information is shared and where research and analysis skills are valued and invested in. It would have six interconnected elements:

1. Clear strategic aims and an understanding of what information is needed to meet them.
2. Investment in union wide data and research skills as well as specialists
3. A culture of sharing data and information.
4. Outcomes-focused technology and systems that meet the union's needs and enable effective operational use, analysis and security of data.
5. A commitment to putting the 'user first', to seeking to find out more about the people it works with and to use that information to inform its work.
6. A willingness to evaluate, learn and adapt if data provides evidence for changes to be made.

Steps that each union can take, regardless of their different circumstances, capacity and resources, to make this a reality are discussed below. This won't happen overnight or all at once but the steps show how unions can establish and embed a new culture of using data.



1. CLEAR STRATEGIC AIMS AND AN UNDERSTANDING OF WHAT INFORMATION IS NEEDED TO MEET THEM

This report has already stressed that in order to use data more effectively, *unions need systems and structures underpinned with a clear sense of purpose*. This was a consistent message from officials who took part in the research. Those unions who have gone through a process to set clear strategic aims will be in a far stronger position to make effective use of data to meet those aims.

With clear aims they can ask: what information do we need to help us meet each aim? What evidence do we need to make our case?

To give a recent example: many unions have recently experimented with holding online conferences. Online engagement data shows that often far greater numbers of members have been able to participate in virtual conferences compared to in-person conferences. Now that in-person conferences are becoming more possible, should unions revert back? If a union aims to widen participation in its democratic structures and have the maximum number of members taking part, then data suggests that online conferences should stay. But if the aim of a conference is to hold in-depth and deliberative discussions then in-person events may still be preferable. There's no right or wrong answer, but a judgement call needs to be made based on what the union is trying to achieve and what the data tells us. Data doesn't provide certainty but by being clear about the purpose and by analysing and learning from the evidence, informed decisions can be made.

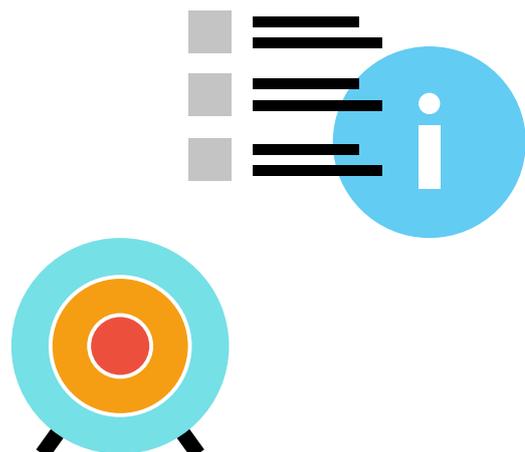
Another example of this can be about how unions improve their support to members and achieve the best possible deal for members.

Officials who contributed to the research frequently described problems with how casework is recorded on their customer relationship management systems (CRMs). This came up in conversations with officials from a range of unions, not just one union. Problems that were highlighted systems that don't easily provide detailed information about the number and types of casework issues that members are being supported with or have been supported with; the *outcomes* of cases not being

recorded or are unable to be recorded; and the storing of data regionally or in branches, making it difficult to assess national trends. Officials have, by and large, found ways to work with existing systems and their limitations. Their complaints clearly highlight systems that can be improved but also highlight a bigger issue.

If unions aim to improve their support to members then it matters if the casework data they hold doesn't provide good enough information about the current support they provide, or if it can't be accessed easily. By being clear about what their aims are and what information is needed to meet their aims, unions can then take the necessary steps, subject to available resources, to upgrade or replace internal processes and systems and improve the quality of their data. A senior official with responsibility for their union's membership services described that when they went through an exercise to clean up their existing data "*what I'm realising (as someone who wants strategically to use data) is we haven't got good enough data to be able to be a data driven organisation*". This helped to make the case for investing in a new CRM so they could use their membership data to "*offer a more targeted, a more segmented and more personal service to members*".

It is a false divide to think about data as being either strategic or operational. It's both. By first having clear strategic aims, unions can assess what information they need and then examine whether their operational processes and IT systems are fit for purpose to enable them to use data to meet their aims. And in a virtuous circle, improved systems and better quality data helps unions to make more informed strategic decisions.



CASE STUDY

ASLEF

Taking the time to ensure new investments in tech meet the union's needs and are shaped by user experience

Summary

ASLEF, Britain's union for train drivers, launched a new website and membership system in 2021. Prior to making these investments, the union went through an extensive review to assess what it needed from its systems to improve them and so that they help to meet the union's strategic aims. This work was informed by input from members.

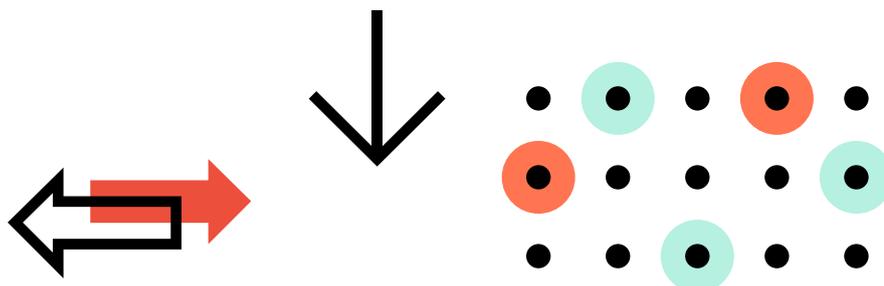
Key points

- ASLEF's work to replace its website and membership system shows the benefits of taking time to thoroughly understand and assess what it would need from its digital systems. They reviewed what systems the union currently had and worked to identify where changes were needed.
- To help this work, the union worked with external consultants who acted as project managers through the process. Members were involved throughout to ensure their views shaped the new systems. They also engaged with other unions to learn about the systems they were using.
- This detailed planning work helped to build support among the union's senior leadership

for the new investments to be made. With complex digital infrastructure projects it is essential that people who may be unfamiliar with using the systems themselves are helped to understand why the investment is needed and crucially, how it will help the union to meet its strategic aims and to improve its effectiveness. User experience data can provide key evidence to make the case for investment.

What other unions can take from this

- By taking time to carefully plan what it would need from new systems, ASLEF was able to work up a detailed specification for them. The new systems they have in place are shaped to meet their needs.
- External consultants can play an essential role in helping unions to identify what their strategic aims are and what systems they need to meet them.
- Groups of volunteer members in this process can be invaluable to make sure systems are designed that are shaped by user experience. Volunteers can also be used to road test pilot versions of new systems to get user input at every step of the way from design to implementation.



CASE STUDY

Community

Establishing a data working group to help more strategic decisions to be made using data

Summary

Community union has set up a working group to lead a year-long project to review and improve its existing data and reporting mechanisms. Its objective is for Community to collect and assess clear, accurate and useful data so that it is accessible and can be used for strategic and operational decision making. Community has over 40,000 members in sectors across the UK economy from steelworkers to office workers to the self-employed.

Key points

- The data project is a core part of Community's three-year communications strategy (2021-24). Community aims to be a data-driven union; an aim that is predicated on a recognition that robust data collection and analysis must be a priority to help the union make strategic decisions using data. A long-term aim of the project is to embed a culture in Community where data is valued and its strategic importance is understood. To turn this aim into a reality a working group has been established which has four steps to guide its work through 2021-22:
 - 1) clean the data on existing systems and review where data is held.
 - 2) conduct a union wide review on what data is required and put in place processes to ensure that data is (and can be) collected
 - 3) ensure its reporting mechanisms are effective so that colleagues understand what information is held by the union
 - 4) put in place processes so that the union's improved data is used to make strategic and operational decisions.
- In the first 3 months, the group has:
 - completed a review of all existing member data on the union's CRM. 550 fields of data on each member will now be reduced to 250.
 - introduced new membership reports that are sent to relevant staff at weekly, monthly or quarterly intervals with information to help them understand membership trends and make strategic decisions.
 - begun a review with all staff about what information on members is currently not held that would help them to do their jobs and enable better support for members.
- One new report shows what issues members have contacted the union about in the last 30 and 90 days. Analysis of this is leading to new guidance being produced for members and non-members who may be experiencing the same issues. This information will be used to triage calls to the union's membership team and the union's work on these issues will be promoted on social media to encourage people to join.

What other unions can take from this

- Evidence based decision making can only happen if good quality information exists and systems are in place so it is made available for use. Community's working group will make sure the systems and processes are in place so decision makers have accurate, useful information.
- The working group shows a union thinking about data in a strategic way. It shows how strategic and operational work is linked. Strategic decision making must be underpinned by robust, effective operational systems.

2. INVESTMENT IN UNION WIDE DATA AND RESEARCH SKILLS AS WELL AS SPECIALISTS

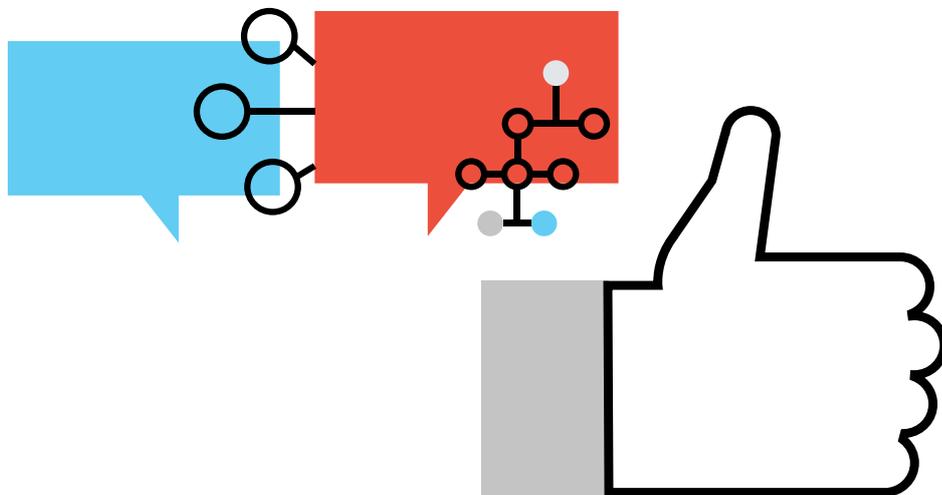
One senior leader argued that “*we can be a little bit pompous that we are the eternal keepers of truth*” and described unions needing to learn from data, challenge assumptions and ask questions, such as: do we have sufficient information about the jobs of our members and what they think about it? What are the long-trend sector trends we need to understand? Do we really know what people want from unions and what they think about us?

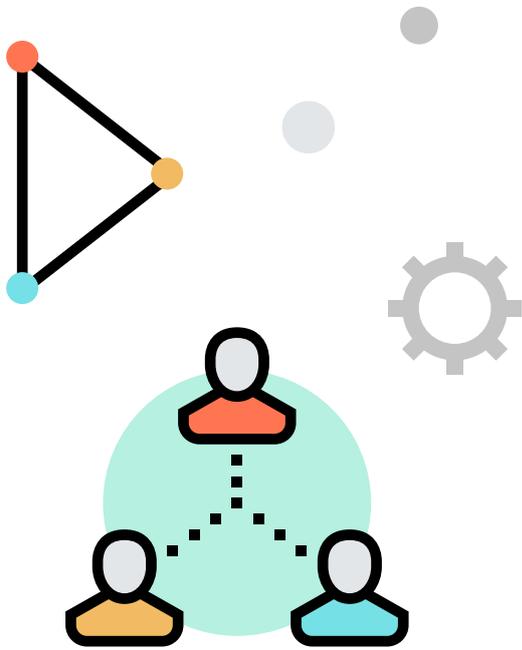
Being able to know what questions to ask and how to get the right information they need about members and industries is vital. In interviews and survey responses, officials described wanting to bolster their union’s internal research capacity so that they can do this effectively. The extent to which unions are able to do this depends on their resources, but it is important that unions **establish and invest in a culture of research to enable colleagues to make informed decisions about their work.**

The research highlighted that few officials had received training in their current role specifically about data and how to use it strategically. Those that had had sometimes received it in previous roles outside of unions. More common was that

people had been trained to use certain software (eg for financial management or membership services). Questions for unions to consider:

- Does data feature in training for union officials, both paid staff and reps? If so, how? If it does feature, is it oriented towards the operational use of data (eg. using particular systems) or is it about the strategic use of data?
- Is there a learning pathway for reps and staff who want to advance their data skills? This may need to range from beginner to advanced numeracy and data training in order to, as one official described, “*meet people where they are*”.
- Does the union conduct regular skills audits of its staff and reps to identify areas of competencies that could be improved with training?
- When new internal systems are introduced how is training provided and to whom? Does the union bring in external trainers (for example, IT suppliers) or is it delivered internally by colleagues or both? Could the union implement a ‘train the trainers’ model when new systems are introduced? This may help to facilitate continuous peer-to-peer learning outside of formal training environments.





A union committed to using data will increasingly need teams of individuals with an advanced set of data competencies that enable them to be responsible for all aspects of data governance.

Typically, this would entail roles that provide expert data analysis (such as Data Analyst or Data Insights Manager roles) and that oversee the development and maintenance of their data infrastructure, including its specific policies such as on data privacy and data protection. They will have the ability to collect, organise, analyse, and disseminate significant amounts of information often using complex data sets and who can develop, use and maintain statistical and reporting systems. We might expect a union's data team to be led by a dedicated Head of Data, a recognised senior manager equivalent in status to other senior management roles that oversee core departments and services such as Membership, Education or HR. Roles may also include specialist Forensic Accountants, employed to extract data from employers' financial records, as well as statisticians. This may require new roles to be created but it may also involve amending existing roles to enable people with specific data competencies to have more data-focused roles that enable the union to benefit more fully from their expertise.

The precise organisational location of the people with responsibility for data governance

will vary in each union. What is key is that **they have union-wide oversight; the authority to make recommendations to senior decision-making bodies, and the authority and necessary resources to be able to implement decisions across the whole union.** Achieving this will typically involve the key people with responsibility for data governance being located very close to the centre of power in the union, to have the backing of senior leaders and to be part of key decision making structures. Senior leaders and executive bodies that take steps to locate data governance and data professionals at the centre of the union make a strong commitment to the value that the union places upon its data and how it is used.

The size and resources of each union will determine the number and nature of the specific data roles they are able to have. For unions with more limited resources, paying for external expert support is a model that may prove useful to help with specific pieces of work. For example, it is standard practice for unions to pay for expert legal advice to support or take on complex casework issues or legal cases if the support needed is beyond in-house skills and competencies. A similar approach could be taken with some data governance issues. Questions for unions to consider include:

- Does the union have a Head of Data? Has the union taken steps to create roles for specialist data professionals, either by establishing new roles or through the evolution of existing roles?
- Does the union have enough data analysis capacity? Research participants consistently identified a lack of analytical capacity as a weakness in their union.
- Where does responsibility for data governance sit in the union? Is there a data governance framework and if so, is it fit for purpose? Who is or has been involved in the process of designing a data governance framework?

Unions are also developing new training and resources to equip activists with knowledge about data and digital technologies and advice about how to ensure they aren't used by employers in ways that are detrimental to members.

CASE STUDY

The Chartered Society of Physiotherapy (CSP)

Creating new roles for data professionals at the centre of the organisation

Summary

The CSP is the professional body and trade union for physiotherapists in the UK. Since 2020 they have invested to create a new small team of data professionals. The CSP's new Head of Data is leading work to develop a data strategy and build its data governance structure.

Key points

- A new Head of Data role was established in 2020 and a data analyst was recruited shortly after. Both are qualified data professionals.
- The Head of Data belongs to the directorate of Corporate Services and Infrastructure (CSI). CSI includes facilities, financial management, data and analytics, and ICT. This shows that the CSP considers data as part of its core critical infrastructure. The data team sits alongside the IT team but is separate from it.
- The Head of Data has established a new data governance structure which sits across the whole organisation. It involves a diverse range of senior people from across the CSP who are being given in-depth data governance training. This group will set data policy for the CSP. They provide and draw on expert advice from across the organisation and make recommendations to the CSP leadership.
- This group is working to address core questions such as: what are the data management needs for the whole organisation? How is the data they hold being used and how could it be used more? How valuable is data to the organisation?

By involving senior leaders who understand the core needs of the organisation (both its strategic and business needs) the group can make informed decisions about the level of resources that can be invested in new systems and how to develop the skills of officials.

- The Head of Data worked with colleagues on the procurement of a new subscription system for the CSP. They worked to ensure the system choice and its implementation align to the strategic vision of organisation-wide data architecture, and to data management best practice.

What other unions can take from this

- The CSP is demonstrating the value of designing a data governance framework with the involvement of a wide range of people who know and understand the union and its needs. By focusing on the needs of the organisation and the outcomes it wants to achieve the CSP is in a strong position to ensure it can get the right data systems for them. The union's approach to date is ensuring that its investments in technology are data-centric, not software-centric, and provide good value for money.
- By investing in new roles for data professionals and locating them at the heart of the union the CSP is raising the internal visibility of data governance. By leading cross-union data governance work the data team is making people aware of data's importance and is developing understanding about what data and data governance is (and how it is different from IT).

CASE STUDY

Prospect

Providing activists with a guide to new digital workplace technology

Summary

Prospect has produced a guide for activists about digital workplace technologies and how they can address the practical issues and potential problems their introduction at work can cause for members. Prospect represents over 150,000 members across a range of professions, including engineers, scientists, managers and civil servants.

Key points

- The guide provides activists with information about the key questions they should ask employers about their use of data-collecting or automated technologies; the arguments and legal frameworks that are available to them to help check if employers are being transparent and meeting their responsibilities, and how collective agreements can and should be updated to respond to new data-collecting or automated technologies at work.
- It is a practical guide to what new forms of technology are being introduced, the issues they raise for unions and details of the relevant legal frameworks that they should be aware of.
- The guide also provides case study examples of union involvement in data and automation at work to learn from; sets out steps for reps to take so that they can negotiate new 'technology agreements' with employers and it provides detailed checklists for reps to go through with employers in specific processes such as Data Protection Impact Assessments.
- To develop the guide Prospect officials collaborated and learnt from technology-focused NGOs and civil society experts and from pilot training.

What other unions can take from this

- As more digital workplace technologies are introduced by employers, unions could produce similar guides to help to raise awareness among reps and members about the use of data and new technologies in the workplace and to support them to be able to negotiate with employers about the issues they raise.
- This will require unions to undertake research to keep up with and ideally ahead of the pace of change in workplaces. This is likely to require extensive collaboration and engagement with members to find out about issues in their work. It is likely to also require collaboration with data and tech experts (eg organisations such as the Open Data Institute or the Ada Lovelace Institute), legal and academic experts (eg who study issues such as privacy and data ethics) as well as learning from other organisations, including employers, to understand how new technologies work and what their actual and potential impact and implications are. By doing this unions will be more able to develop new training courses and learning resources.
- Detailed information guides for members are an excellent way to help raise awareness and understanding about new and potentially complex issues such as data. They can complement formal training courses and play a key role in the learning pathways unions provide for members.
- By involving reps in employer-facing issues around data, GDPR and areas of best practice, the union has learnt from them to develop its understanding of its own data requirements and practices.

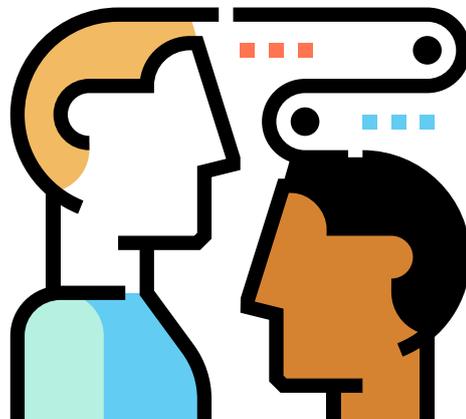
3. A CULTURE OF SHARING DATA AND INFORMATION

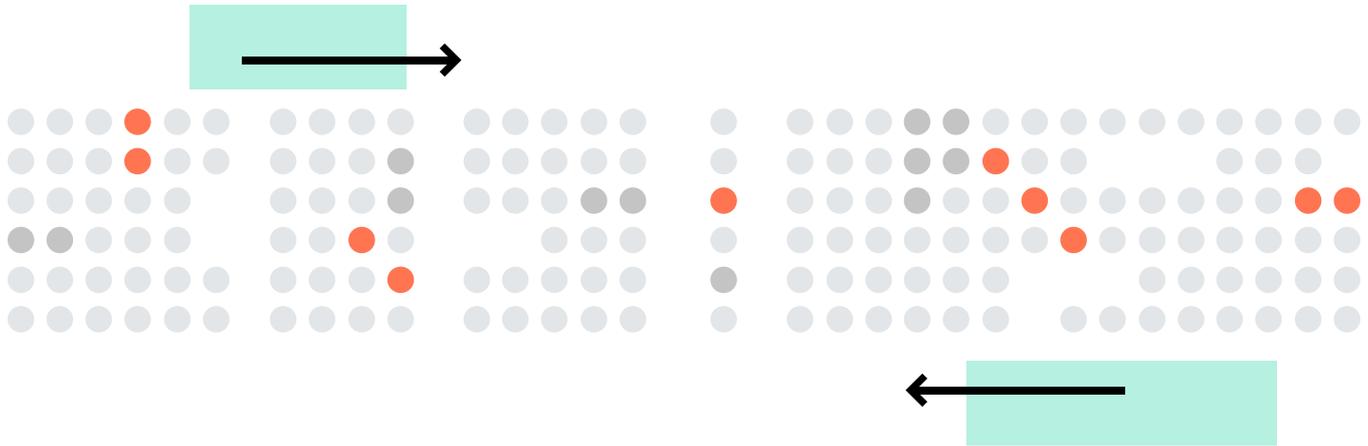
One official described how in a previous organising role nearly 10 years ago they had been the first person in the union to regularly use SurveyMonkey to run online member surveys. Their surveys gathered a wealth of new data from members. The information it provided was deployed in industrial campaigns and led to wins for members. The official's work had an eye-opening impact on their colleagues who hadn't previously been aware it was possible to gain that amount of high-quality data from members that quickly and easily. Those colleagues were also able to use the information in their work and wanted to know how they could run surveys themselves. Today, member surveys are firmly embedded in the union's organising culture. This came about not just because of one organiser's pioneering use of a new digital tool but because the new information they were able to gather was used to get a better deal at work for members. By sharing the details about the surveys, by showing and helping colleagues how to use the same digital tools and then how they can use the information they provided, new knowledge and ways of working diffused through the union.

In 2022 there will be trailblazers in *all* parts of unions – and not just in industrial roles – pioneering with new tools to gather and analyse new data. What the survey example above shows is the benefits of sharing information, and that we shouldn't focus on which tech is used but on how that tech can enable new information to be gained which can then be used in the union's work. Another key learning point is to stick with things: repetition works. If a new process is working, then sticking with it is key to it becoming embedding and normalised, even if at the outset it isn't widely used, well understood and may attract hostility by challenging existing practices.

The research identified that not all unions have a culture of sharing good practices and new information. To counter this, some steps that unions could take and questions to ask include:

- Does the union hold online webinars to share new and best practices or new research that has been produced? If not, could it? Webinars for all staff and/or all reps can be easy to facilitate and are an effective way to disseminate information and new research.
- When colleagues gain information from a new data source or change how they work to gain new information, what happens next? Is there an internal culture of identifying innovative new work, celebrating successes and sharing it? Is there a culture that encourages and enables people to experiment and try new things out?
- When new data is collected and analysis or reports are produced using the information it provides, how widely are they shared? What is the distribution list and could it be wider? Can it be shared with members?
- Good questions for officials to ask themselves are: might other people who are perhaps outside of my team or department find this information useful? If this information isn't being shared, why not? Could aspects of the information be shared and made available?





- Does the union have a central repository for storing information? Could one be established so that colleagues know what information the union has or doesn't have? (For example, one union is establishing a new Staff Library Group for officials, while another is setting up a central record of pay agreements that the union has struck so that all its organisers can access it and use it in their work). If this work is too big to initially run union-wide, could it be piloted in teams or departments?
- Are records kept about surveys that are sent by branches, regions and via the head office (not only the results but also the themes and details of who they went to)? If not, are systems in place that could capture this information? This isn't about micromanaging but about avoiding duplication. It could help colleagues to learn about effective survey design and avoid members being bombarded with too many surveys.
- When colleagues in policy development and research roles commission and write research reports, or if opinion polls or focus groups are commissioned, how widely are they shared? Could they be shared more widely than they currently are?
- All of these questions are fundamentally about recognising that a unions' data is an asset to be invested in, shared and made use of.

A useful analogy for thinking about sharing data is that of a light switch and a light dimmer switch. With a light switch, it's either on or off, all or nothing. It's not appropriate, needed or sometimes legal for *all* data that unions hold to be shared widely (see Table 1 for lots of examples) but equally that isn't a reason not to share any data. No-one is helped by being kept in the dark. Lots of data that unions hold and are gathering could be shared more widely than it currently is, either fully or partially. With a dimmer switch it's possible to control how much light is given, it's not all or nothing. If we apply this to data, we can think: how can we give people access to the information they need and how can we facilitate access to information they might be able to use in their work.

CASE STUDY

FDA

Surveying members to understand their views and bolster the unions' industrial work

Summary

The FDA represents professionals and managers in public service. During the pandemic many FDA members have worked from home, some or all of the time. The union surveyed its members and found an overwhelming majority want to continue to be able to work remotely. The union is using the findings to negotiate and lobby on behalf of its members for more flexible working in the civil service on a permanent basis.

Key points

- During the early period of the pandemic when nearly all of FDA members were working at home, officials identified that member engagement since the shift to remote work was very high, particularly about the issue of remote work. They recognised that this felt like a permanent change in working patterns and not just a temporary emergency situation.
- They also saw that their members were being attacked by some ministers and by sections of the press for working from home and anticipated that attacks of this kind were likely to increase.
- They sent members a Working Hours Survey to gather data on how members were working and how they wanted to work in the future. Data from members showed 97% wanted to continue to have the option for work from home in future, if working at home was no longer the default.

- The survey results were communicated to members and shared publicly in January 2021 in a news post on the FDA website. The union communicated clearly to its members and the public that it would use the findings to build a case for a future of working across the civil service that promotes flexibility and ensures a better work-life balance for members.
- The union is using the findings to inform its dialogue and approach with employers in negotiations about post-lockdown working arrangements.

What other unions can take from this

- Timeliness and clarity of purpose are key issues to consider when planning member surveys. Members are pushed for time, and it needs to be clear what surveys are about. Single-issue surveys on timely issues that matter to members rather than general surveys that cover lots of issues are likely to yield high response rates from members and therefore a richer dataset.
- Publicly sharing findings from member surveys and the union's response to them shows members and non-members that the union understands the issues affecting them and the action they are taking in relation to them. Sharing data with members can help them to use it to organise in their workplaces and publicly sharing data can influence negotiations.

4. OUTCOMES-FOCUSED TECHNOLOGY AND SYSTEMS

A theme that ran through the research interviews and roundtable discussions with officials was how many unions are in the process of planning, commissioning and implementing new IT systems to help them make better use of data. What was also clear is that much of this work had been necessary to replace outdated or substandard systems, variously described by some people as “clunky” and “steam-powered”. This report doesn’t make recommendations for the best systems for unions to use because that is for each union to determine. But a core finding from the research is that unions can make effective use of data when they have systems that enable officials to use, share and analyse data efficiently; that prevents data being siloed in different departments, and that are specifically designed for them.

Officials involved in the commissioning of new systems recognised that what they needed were systems built for them to specifications designed to meet their needs. They described how current or previous systems had been ‘off the shelf’ products provided by long standing IT suppliers who, as one person described, but in a view shared widely, are seen to have unions “in a headlock” and don’t provide good service or value for money.

Alongside cost, a key factor for deciding about new investments is risk management. The two can go hand-in-hand. Officials highlighted the benefits of a modular or ‘tech stack’ approach that they are taking when upgrading their systems. This means using a range of providers rather than just one and having “loose couplings” between them. This can reduce costly lock-in effects with suppliers, provide greater flexibility and reduce the

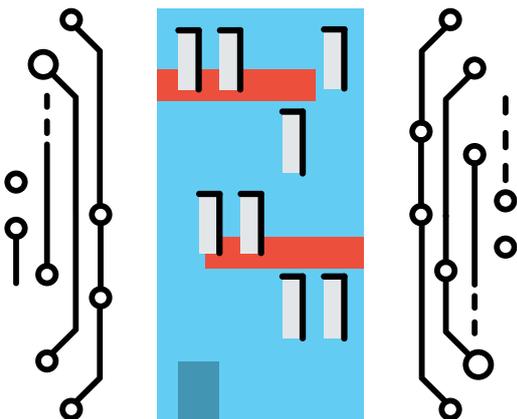
risk of systemic failure. To illustrate, one official described that a modular approach to technology means that if they felt:

"the bulk email service that we brought in two years ago doesn't look like the best one on the market for our needs. We can take that bulk email service out and bring another one in. And because we've got this kind of loose coupling, there doesn't have to be any break of stride when we do that."

They contrasted that with a situation where if the same software is running a union’s CRM, membership database and email system, they risk being stuck with a bad email system, reliant on a big provider making upgrades or having to replace everything.

A modular approach is seen to be preferable as it can provide unions with a better data management service as data can be partitioned more easily, and critically because it provides unions with more control. For example, services can be adapted quickly if the unions’ needs change, including by scaling up or down usages, or they can be replaced if the technology doesn’t work as effectively as expected. In some cases, depending on the scale and complexity of the organisation and its data needs, it will also prove to be a cheaper option as services can be piloted on a smaller scale before being adopted more widely, and without being tied into long contracts with expensive break clauses.,

The case studies below show how unions are taking steps to design and implement bespoke systems that work to meet their needs. As unions across the board take steps to establish a culture of using data and raise people’s data literacy and competencies, they will be increasingly able to reap the benefits of replacing an old ‘software-centric’ approach to data that lies at the heart of many problems with existing systems with a new outcomes-focused approach.



CASE STUDY

Society of Radiographers**A cultural shift to empower its reps and improve accountability****Summary**

The Society of Radiographers (SoR) is the trade union and UK professional body for radiographers. The SoR is commissioning a new CRM system and developing a new development pathway for their reps to sit alongside it. The new CRM is one part of a cultural shift that the union is making to make their reps more accountable and empower them to be more effective.

Key points

- The SoR has high member density and a very healthy ratio of lay reps to members. Leaders recognised they needed better data on the work of their reps. They want to celebrate what reps do well, identify why and empower reps to be able to do more. They want to establish a culture of continual professional development in the union.
- A new CRM is being commissioned as part of their work. It will be designed so that reps can quickly and easily record details of their work. Once in place, regional SoR officials will be provided with data about reps' activities. The data on their level of activity and the outcomes they achieve will enable development opportunities to be tailored to each rep to build on their strengths and provide support to people who may require it.

- The SoR's new development pathway will require reps to undertake core accredited training that they must do on a refresher basis to remain an accredited rep. Reps will have access to progression courses to provide pathways towards particular specialisms or to enhance their general skills.

What other unions can take from this

- The SoR approaches the task of commissioning a new CRM with clear strategic aims. The CRM is a necessary part of establishing a culture in the union where reps are empowered through professional development and greater accountability. The CRM will be outcomes focused and designed to meet the SoR's needs. The data that it will record will give the SoR the information it needs to help reps develop and increase their accountability.
- Rather than roll everything out in one go, the new core training for reps, the new CRM and full development pathway will be piloted and introduced gradually over the next three years so that each step can be reflected upon and adapted if necessary. The changes will be shaped from the reps and members up rather than from the top down.



CASE STUDY

National Education Union

Developing digital engagement and activism tools for members

Summary

Over the last 2 years the National Education Union (NEU) has utilised a range of new digital tools to deepen engagement with its 500,000 members, significantly increasing activism and leading to high-profile wins for the union. New tools have been developed in-house and enable the union to generate and analyse significant amounts of data about its members .

Key points

- The NEU makes extensive use of online tools to engage with its members in from mass 'town hall' style phone and Zoom calls, to texts and Facebook. They have innovated to develop a suite of their own digital tools to better engage with members and learn more about them.
- The tools in the NEU's tools system all speak to each other in real time and are based on a member's engagement with the union. They call this 'Moneyball activism'. It's about analysing trends in the union's own data rather than relying on external data.
- At the centre of their work is NEU Communicator, a hub for all of the union's digital communications. Communicator takes data from sources including the membership system, SurveyMonkey, Zoom and campaign email and text data. The data is analysed to assess which members are engaging with the union and why.
- 'Personas' of different types of members and their expected behaviours (e.g. supporting particular campaigns or leaving the unions) are then developed. Analysing member engagement data allows the union to create

bespoke campaigns. Individual members and schools can be targeted in different ways, on different topics and with types of different campaigns.

- Other bespoke tools that have been developed include a health and safety app which gives members a step-by-step guide for how they can ensure their school workplaces are safe places to work. It provides a 5-step process helping members to act on concerns and take escalating steps to force changes.

What other unions can take from this

- The NEU's impressive development of digital tools is a product of the union investing resources to in-house research and development. This has required recruiting people with specialist data analysis, marketing and digital campaign and software development skills.
- The NEU's new tools are designed with a clear purpose: to achieve wins for its members and build a stronger union. Bespoke tools and campaigns are then designed to help achieve these aims whether that is to improve health and safety in schools, to win better pay deals, protect their pensions or to identify members who are likely to become reps.
- All the new digital tools that the union has developed all run off the same database. They are all designed to understand member's opinions and provide extensive analysis of how members engage with the union and why.
- By investing in its own tools the NEU aims to cut costs by not using third-party software. This will provide better analytics data than is available commercially.

5. PUTTING THE USER FIRST

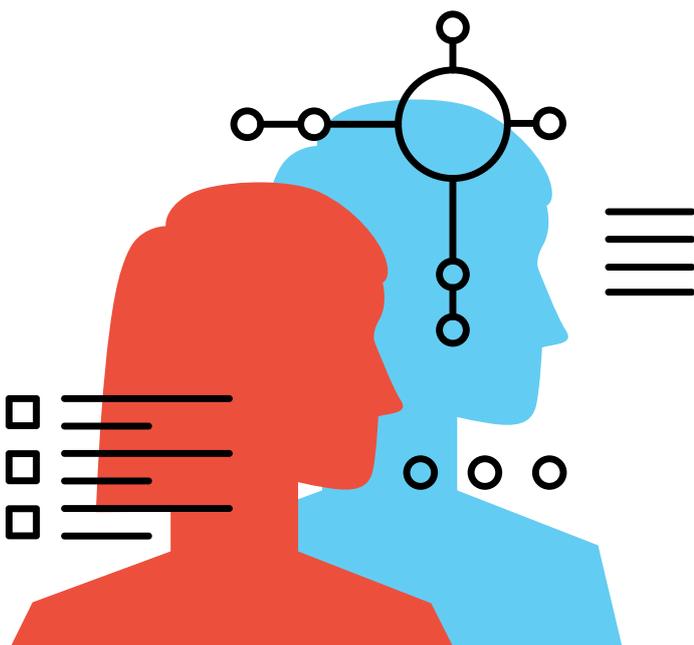
An idea that featured prominently throughout the research was that unions could and ought to put more emphasis on understanding the ‘user experience’. Often this was discussed by keen advocates of using data but it isn’t an idea widely used in unions, despite being a prominent focus for many private, public and third sector organisations.

In short, focusing on ‘user experience’ means focusing on understanding what interactions and experiences ‘users’ have when they come into contact with an organisation and the services it provides. It’s about understanding their users’ perceptions of the usefulness of the service, how easy it is to use, its efficiency, and the value they place upon the service. In other organisations, another way to think about user experience is ‘customer service’ which may explain the relative lack of awareness about it. Several interviewees noted that they thought customer service can be seen as a ‘dirty word’ in unions although they also felt this perception was changing.

For unions, their users are typically their members but users are also members of the public who should be seen as future members.

This matters because by collecting data about how people interact with the union, why they do or do not interact with the union and about how satisfied they are with their engagement, will give unions a rich seam of information that will help them to improve the effectiveness of their work and their offer to members. As one general secretary remarked “*we spend more time thinking about our members than they spend thinking about us*”. This insight is critical: when members do choose to engage with the union or need their union, the experience that they have at that time really matters.

To give an example, if a member gets a new email address and wants to tell the union – how easy is it for them to do this? Can they do it themselves? Is there a member section on the website where they can make the change (if so, how easy is it to use? can they use it on their phone?) or do they need to send an email or call a contact centre? If they change the address via the national website, will their branch be given the new address? If the member’s experience of making this straightforward change is poor or frustrating then it matters because if a member is pushed for time and gives up without making the change then the union risks losing contact with them. They may also form judgements about the perceived effectiveness and efficiency of the union more broadly.



CASE STUDY

Unions 21

Finding out what the public thinks about their jobs and unions

Summary

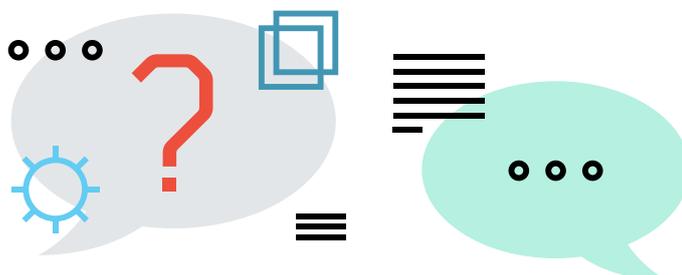
In September 2021 Unions 21 commissioned an opinion poll and two focus groups to understand public attitudes about employment during the COVID-19 pandemic; about attitudes towards trade unions and people's experiences of engaging with trade unions.

Key points

- The polling and focus groups provided rich qualitative and quantitative data about people's experiences of work during the pandemic, what they think about their jobs and their attitudes and understanding of unions.
 - Two focus groups with key 'user groups' for unions – members and non-members – were run. The members focus group provided information about how members engage with their union; how they might want to engage with their union, and whether members are satisfied with the current membership 'offer'. The non-member focus group provided information about how non-members understand unions; what might encourage them to join one, and how they might want to engage with it.
 - Unions 21 have shared the findings with its members to inform their work and they will inform Unions 21's future research and support for unions.
- A polling and market research agency was commissioned to undertake the research. Commissioning agencies can be expensive but the benefit of using external expertise is that agencies can reach a wide representative sample and provide rich qualitative and quantitative data and analysis. Members of the public may also give different answers to independent researchers than to unions if they conducted similar work in-house. To reduce costs of using external agencies, unions could jointly commission work if the information they want will be relevant to different unions.

What other unions can take from this

- Understanding how members and non-members attitudes towards unions and their experiences of engaging with unions is vital information for unions. With knowledge about why people join or don't join and why people stay and also leave, unions can be better informed to evaluate whether their member offer is sufficient. If changes are required then in-depth qualitative and quantitative information of this kind helps to identify what and how things might need to be changed.
- Some of the findings of this research raise hard questions and uncomfortable truths for unions. To be able to improve their offer to members, increase their effectiveness and reverse the long-term decline in union membership unions can't shy away from findings of this nature.



CASE STUDY

The BMA

Union policy informed by user experience

Summary

The British Medical Association (BMA) is the trade union and professional body for doctors in the UK. The BMA has a Patient Liaison Group (PLG) which represents patients within the BMA and provides the union with an informed patient view. The PLG means the BMA hears directly about the experiences of people who use services its members provide. Their views and experiences – qualitative patient data – gives the BMA information to inform its policies.

Key points

- The BMA's mission statement begins with "*We look after doctors so they can look after you*". The patient-doctor relationship is central to the BMA's work. They are committed to improving the patient experience.
- The PLG provides the BMA with an informed, independent patient and public perspective on issues that matter to the medical profession, patients and the public. It meets four times a year and also has representation on key BMA Branch of Practice Committees, regional councils and relevant working groups. The PLG Chair has a non-voting seat on the BMA Council.
- The PLG acts as a critical friend to the BMA on issues affecting patients. It scrutinises the BMA's decision making and policy development and ensures that the BMA's policy is informed by patients' experiences, interests and concerns.

What other unions can take from this

- The PLG shows how user experiences can be used to inform union policy.
- 'Users' for unions are not just members but can be users of the services their members provide.
- Understanding patients' experiences helps the BMA to build common cause between its members and the people they look after.
- The information provided by the PLG shows the value that union can gain by investing time and resources to understand user experience. This enhances the BMA's work to improve healthcare services and to represent doctors, support them in the challenges they face and defend and improve their terms and conditions.



Unions that collect user experience data are able to use the information it provides to help them to meet their aims for recruiting and retaining members.

For example, when members don't renew their membership or resign, are they asked why? Not everyone will share their reasons but the information from those that do could be invaluable to identify problems and experiences that may also be affecting other members (the process of asking and showing a willingness to engage with the member's reasons for not renewing may also encourage them to retain their membership). One union has piloted a 'leavers offer' which saw them contact lapsed members to offer an enhanced membership benefit package if they were to rejoin. Small-scale testing provides an opportunity to experiment, test options and evaluate.

Sample surveys of segments of the membership, both new and longstanding members, to learn about their experiences of engaging with the union can provide insights into what members value about the union. This can help unions to develop a clear 'value proposition' for membership and how to become more active in their union. Unions are increasingly using the 'net promoter score' (NPS) model to measure member's experiences of the union. NPS is a widely used and standardised measure used in many industries of customer/member satisfaction and their willingness to promote an organisation or brand. Members are asked how likely on a scale of 0-10 they would recommend the union's membership to a friend or colleague. Due to its standard format the results can be assessed across different sectors and industries or according to different member demographics.

Another key user experience is that of reps. Are they happy? Do they feel supported or out of their depth? Do they have training and development needs, or are there systems they use that they think could be made better? A union that collects data to help them to answer these questions will be able to better support their reps – the backbone of the union – and help them to become more effective in the work they do to deliver for members.

All of this begs the question, how do unions know what people's experiences are when they interact with the union? The first step to answer this is

that unions *have to want to know* this information. Gathering and analysing user experience data may lead to uncomfortable information and identify areas for improvement but it may also highlight a union's strengths and good practices. This could be in the form of surveys, user feedback panels or focus groups. For reps it could come from annual review processes, if they exist. It also requires analysing data from existing systems to find patterns and trends that shed light on how people engage with the union (eg. web analytics, renewal data, casework outcomes). Much of this work will already be done within unions but interviewees reported that it is not always done routinely or systematically and that, crucially, it doesn't always lead to changes if the data suggests they may be needed.

Systematically focusing on user experience encourages a mindset of scrutiny and of wanting to find out more information. It encourages testing, evaluating and analysing, all with the aim of seeking to improve effectiveness.

- How widely understood is the idea of user experience in the union?
- Is user experience data routinely collected across the union or in parts?
- Is user experience data shared, even and perhaps especially, if it signals areas for improvement? If it is, how widely is it shared and with who?
- Does user experience information feature in management information that is made available to leaders, executives and senior management teams?
- But most importantly: if and when user experience information is gained, what happens next? What changes are made in response to this information to build on strengths and address areas for improvement?
- A data-driven union will adapt if data provides evidence for changes.

6. LEARNING FROM DATA TO MAKE EVIDENCE-BASED DECISIONS

“When the facts change, I change my mind. What do you do, sir?” is a remark most associated with John Maynard Keynes (although it actually came from another economist Paul Samuelson). The remark is still heard today because it is used to make the case for evidence-based decision making. This report has argued the way for unions to effectively

use data is to have clear strategic aims and then to ask *‘what do we need to know to help that aim?’* It relies on unions having a culture of research and recognising that they may not already have all the information they need. Once new data has been collected and new information provided, we get to the final part of the process of being data-driven: learning from that evidence to make decisions and if necessary, making changes that are guided by the evidence.

CASE STUDY

Finansforbundet

Growing the union in a new sector

Summary

Finansforbundet is a Danish union for people working in the finance sector. In 2014 the union analysed sectoral trends such as data on jobs and investment to find out how the sector was changing. This work identified that in other countries like the UK investment was growing in new fintech firms. Based on the information that their analysis provided the union took a decision to work with the finance industry to grow the fintech sector in Denmark so that they could build membership in it and ensure the sector would provide good jobs.

Key points

- The union’s strategic research led them to ask: *where will the union be if this sector grows in Denmark without us?* To avoid that scenario they got on the front foot. They worked with industry associations and the Copenhagen municipality to establish a fintech hub to encourage the sector to grow in Denmark.
- The union’s conclusion that the sector would grow proved correct. It now employs 3000 people, investment in the sector has increased from 13 to 470 million euros and it is recognised as a sector of national importance.

- As the fintech hub grew and attracted start-up firms, the union struck a collective agreement for the sector in 2021. Their message to new firms was that by signing up to the agreement they would be able to concentrate on growing their business. Having struck the collective agreement, the union is now aiming to grow its membership in fintech.

What other unions can take from this

- Strategic research to understand the sectors and industries that members work in can help unions to identify opportunities for future growth.
- Analysing data of global trends provided the union with information about how the finance sector was changing. Finansforbundet used this information to make an evidence-led decision to invest resources to seek to capitalise on a new opportunity.
- The union is benefiting from its early decision. But success wasn’t guaranteed. It happened because the union invested in strategic research and subsequently committed resources to grow the fintech sector.

If the facts change and provide new information then are unions willing to make changes?

Are they willing to do things differently and to scrutinise existing ways of working? All the themes, ideas and questions in this report have sought to make the case for how unions can benefit by answering yes to these questions.

Data-led changes can lead to major investments as the case study example below from Denmark shows. Changes are more likely to arise if unions have a culture of inquiry where it is normal to scrutinise and evaluate existing practices in order to determine if they meet the strategic aims of the union.

Trade unionists are well used to interrogating data presented to them by employers and to ask for more evidence. Turning the same scrutiny upon internal data and practices is likely to lead to more robust and widely-used data.

Until recently the executive and staff of one union were sent a monthly membership report that was over 70 pages long. An official new to their role questioned the report's utility and asked colleagues about it. This provided information that colleagues with limited time were not reading the report because it failed to present information in a helpful way, yet it had continued to be produced – why? Seemingly because that was the standard practice and because its usefulness wasn't being called into question. The official has since made significant changes to cut down the report to just two paragraphs of the key information that people need to know; a move that was positively received. Why didn't this happen earlier is a good question to ask? A better question to ask is: what is the purpose of producing the report? That can be answered by assessing what the key membership information is that could usefully be shared each month and who needs to receive it. Different people or teams may need different information to help them in their work. If a report is being produced with no evidence that it is communicating information in a useful way or that the information it contains is being used or even read, then it is right to question whether it is needed or if there is a better way to share the information.

This example highlights the benefits of scrutinising why things are done as they are and then making changes if the evidence makes the case for doing so. A lack of familiarity with using data can often encourage the sense that reports, spreadsheets or presentations that are data-heavy are 'correct' and can't be questioned. Often this really isn't the case. Data can too often be presented in an unhelpful way with insufficient explanation of what information is provided and at times too much or irrelevant data is shared when just the key messages would suffice. Further information can always be made available on request. Asking questions is likely to also lead to more effective presentation of data which is more likely to help colleagues use the information it provides as well as enable people to say if they don't understand something. Senior leaders, line managers and those in positions of authority have an important role to play in normalising a research culture and to lead by example by asking questions, wanting to know more and saying if they don't understand information.

Scrutiny of data takes us back to the importance of asking *why*; *of purpose*: what are the key aims that the union is seeking to achieve and does this information help to meet them? If not, is there missing information that is needed or could it be analysed and translated in more effective ways?



CASE STUDY

Fórsa

Learning from feedback to upgrade its training offer

Summary

In 2018 Fórsa, the largest public service union in Ireland, was formed after an amalgamation of three unions. Officials reviewed feedback from branches and participants in the new union's training programmes and decided to conduct a full evaluation of all training provided by Fórsa. This was conducted in 2019/20. Data from the evaluation process was used to develop a series of wide-ranging recommendations to upgrade the training offer which have since been implemented. In 2022 a consultation process with branches to review the new courses and learning pathways will be conducted.

Key points

- To conduct the evaluation, Fórsa officials gathered information from different sources: phone interviews with training participants, a desk review of training materials, workshops with tutors and NEC members, and surveys of NEC members. The process was designed to gather data on what was working well, what needed to be improved, what needed to be added, and whether or not anything needed to be retired.
- After the evaluation, the Fórsa Skills Academy was created as the hub for the union's training and development offering. A new structure was created so that courses are now provided at three distinct levels: Introductory, Expanded and Advanced.
- The evaluation's recommendations were directly informed by data gathered during the review. For example, it identified a clear desire from members and reps for introductory training for new reps and for a more tailored

approach to advanced courses for more experienced activists.

- The recommendations from the evaluation seek to encourage the creation of a culture of continuous learning. For example, all training participants now receive individual follow-up emails from the Skills Academy Coordinator. These emails also go to the member's Branch Executive Training Officer/Secretary. Branch officers are included so they can encourage learners to use their new skills and get more involved.
- The Skills Academy leaders will conduct an annual review of which members have received training to assess who is progressing to more advanced training and identify if they are getting more involved in the union. In 2024/25, 5 years after the first evaluation, another large-scale evaluation of the whole training programme is planned which will feed into the union's new strategic plan.
- The new Introductory course, Forsa 101 began running in 2021 and has already proved extremely popular with members.

What other unions can take from this

- Huge value can be gained by evaluating existing programmes, scrutinising how things are done and questioning if improvements can be made. In-depth evaluations take time and resources but the rewards are large.
- By gathering views from members and analysing the information they provided, a new training offer that is fit for purpose for Fórsa and its network of workplace representatives has been developed.

3: Data-driven decision making

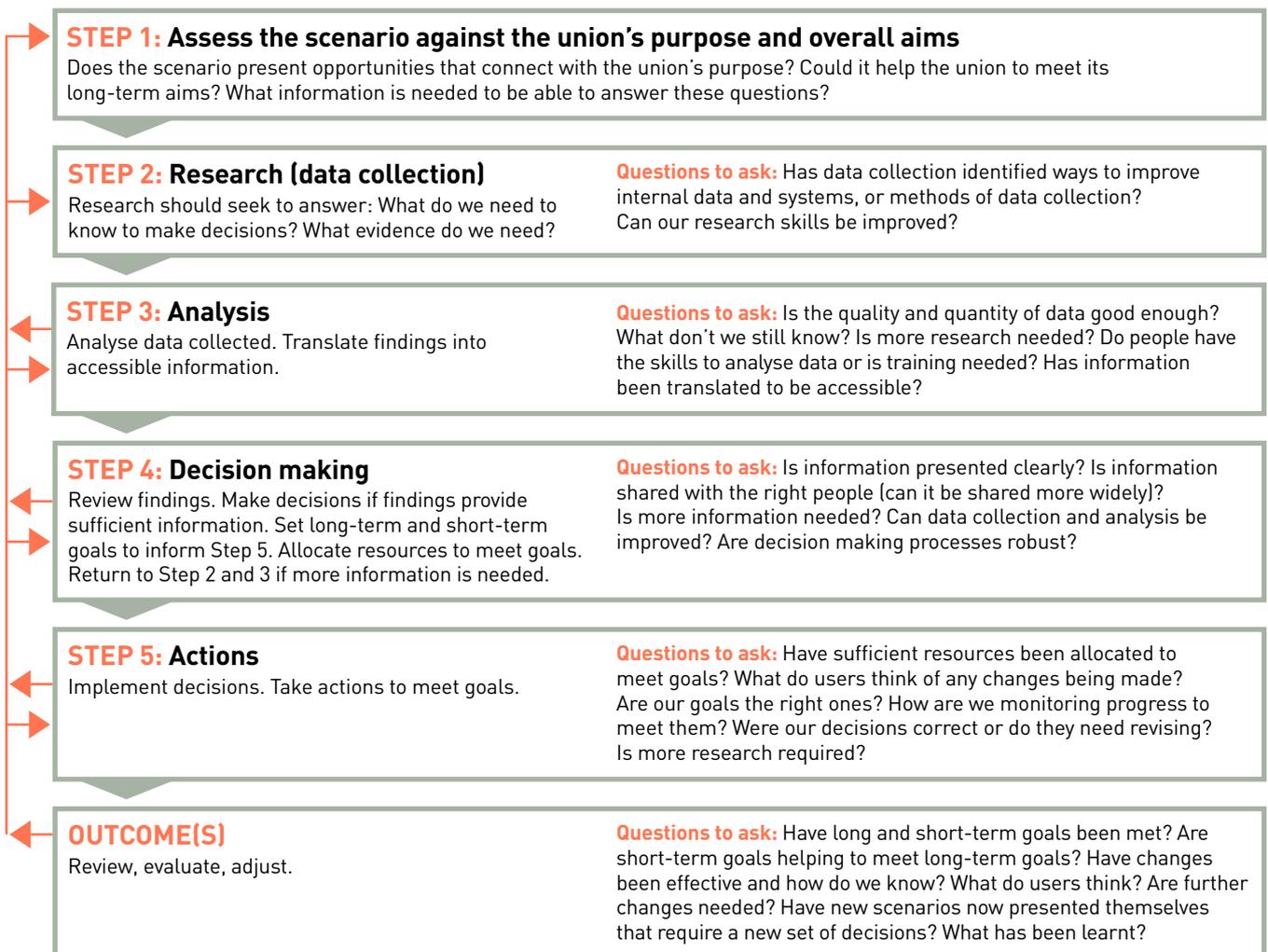
In this concluding section, five imagined scenarios are used to show how unions can work towards becoming more data-driven in their approach and structure. The scenarios illustrate how unions could act when the use of data becomes normalised and embedded in its everyday practices and within people's roles.

To help guide people in unions through this process, Figure 1 shows how a data-driven

approach to decision making could take place and the types of questions that should be asked to inform it. The reality is always more complex and sometimes messier than any example, but the key point is that decision making and using data to inform decisions is an iterative process. It requires research and analysis before decisions can be made. Importantly, it also needs reviewing, evaluating and adjusting to take place throughout the process.

Figure 1: Review, evaluate and adjust

Making decisions that are guided by data is iterative and may require going back to go forwards. At each step, and when and if outcomes are achieved, it is important to: review progress, evaluate the effectiveness of the processes and of any changes made, and make adjustments.



SCENARIO 1

Preventing job losses

A large multinational employer issues a profit warning and indicates that job losses in the UK may follow which places the jobs of a significant number of the union's members at risk.

STEP 1: PURPOSE

The union has a strategic aim to protect its members' jobs. This means the initial question is not whether the union should take action but how.

STEP 2: RESEARCH

The union appoints a lead officer to bring together a cross-department working group including people in legal, research, industrial and comms roles. The group's initial discussions focus on the key questions of why they need to collect data before focusing on what data needs to be collected and then on how they will collect it. They establish that new data is needed to fully assess the union's options and provide the union with the best possible understanding of the situation. They agree a programme of research to:

- **Understand the situation in workplaces:**
 - What do reps and members already know about the likelihood and volume of potential job losses and how strongly do they feel about them? A reps survey and a survey of members are conducted. To gauge the strength of feeling, the quantity of survey responses is monitored as are other metrics including email open rates and clicks. An FAQ webpage for members about the jobs threat is created and traffic to it along with time spent on the page and clicks on the page are monitored. The union also reviews all recent member enquiries and case work for this employer.

- **Understand member sentiment towards employer:**

- What would members be prepared to do to protect their jobs? They collect member sentiment data from social media; hold a branch meeting to discuss the problem and test potential protest scenarios in the meeting as well as with a small group of reps.

- **Understand the unions points of leverage:**

- What could be routes to avoid job losses through negotiations? They collect data via strategic corporate research which involves forensically compiling information about the employer's finances and business model as well as equivalent information for competitors and similar employers. Data about projected changes to the industry (including on future employment, investment and trade patterns) is also gathered.

STEP 3: ANALYSIS

To produce a report, officials and reps collaborate to analyse the full range of qualitative and quantitative data that has been collected. Their analysis highlights gaps where fresh information is needed and so further research is undertaken. This involves gathering information from sister unions in other countries with experience of constructive working with the same company. While an action plan for the NEC and senior leaders is being drafted, there is constant contact with reps and company representatives to keep on top of the situation. The report is adapted as new information is provided.

STEP 4: DECISION MAKING

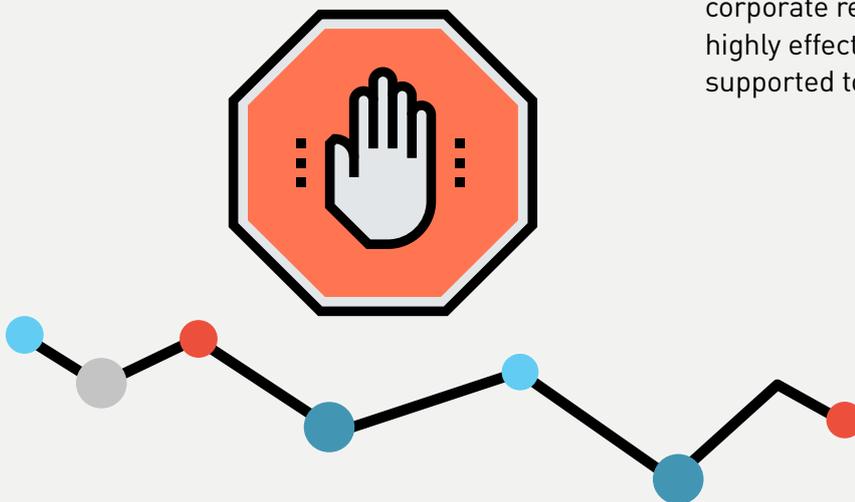
Senior leaders and relevant NEC review the report and its recommendations against a series of previously identified priorities. Actions are agreed including regular review points. Shaped by the union's research and analysis, this programme of action includes:

- Developing a communications plan which keeps members, reps and the media informed about the union's work. The key comms metrics that will be monitored are agreed as part of the comms plan.
- Negotiations which include actions such as regular meetings with the employer and outreach to key stakeholders.
- Resource allocation including reallocating officials to work with reps on the ground. Additional resources are allocated to the union's research and comms department to produce briefing materials and online targeted ads to encourage membership growth.

STEP 5: ACTIONS

At key review periods, the working group assesses the effectiveness of the actions and makes suitable adjustments. For example, if the targeted recruitment drive is not bringing in new members, or retaining existing members, messages and targeting might be changed, as well as increasing resources to support reps to organise on the ground and online activities. Or, if the company issues a new financial update which increases the threat to jobs, the union should undertake further research and analysis. In response the union might then commit more resources to a larger public engagement campaign including producing briefings for elected local and national politicians and parliamentary lobbying. New information fed in by reps, negotiators and officials should be used throughout to inform the campaign as it evolves.

At the end of the campaign, the union identifies that the campaign has highlighted gaps in its data and commits to addressing them. An example could include identifying that the union has out of date contact information for many members and undertaking work to rectify this. The union could also identify ways to increase its strength and capacity, which may include allocating more resources to bolster its capacity for strategic corporate research work and identifying a set of highly effective activists who are encouraged and supported to take on greater responsibilities.



SCENARIO 2

Recruiting a new group of workers

The union is well-established in a sector where its members have recognised professional status. In recent years, an increasing number of new roles have been established in the sector as a result of contracting out a range of new support services. These roles do not have professional status and a large number are held by people who are self-employed.

STEP 1: PURPOSE

The union has a clear mission to represent the workforce in the sector. The union opposed outsourcing in the sector on the grounds that it would undermine terms and conditions for its members and their professional status. Also, the union does not have experience of organising self-employed workers. Members and officials are split about how to approach the situation. Some favour recruiting new members from the new part of the sector's workforces, others do not. Senior leaders agree to monitor and investigate the potential opportunities.

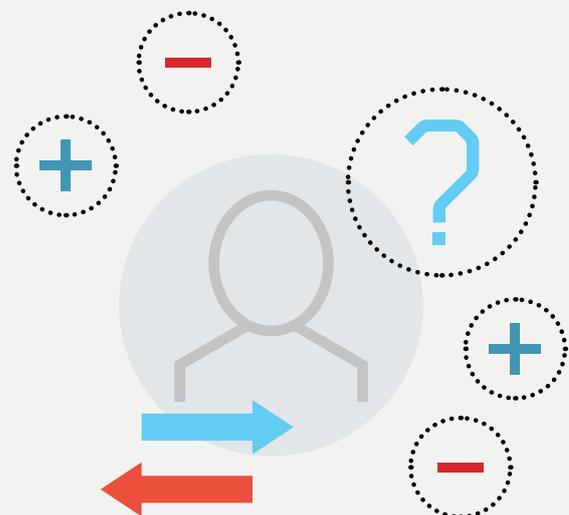
STEP 2: RESEARCH

The union creates a cross union task and finish group to review and research the viability and impact of the recent workforce changes on the union. They agree that data is needed on:

- **Labour market/employment relations trends:** Members of the group are tasked with investigating the projected growth of these new roles in the sector, drawing on data from the ONS and from employer and professional bodies. The group also commissions an external report to examine employment trends in comparable countries. Using its well-established relationships with sectoral commissioning

bodies and large employers, the union discusses the employment changes in detail with them as part of its data-gathering.

- **Membership trends:** The membership department gathers member data over a period of time to examine whether there has already been a growing number of self-employed members who were previously in more traditional roles. A key part of this work is to investigate whether people in the new roles, especially the self-employed, would be keen to join the union and what they may look for from a union.
- **Member views:** Communication and organising departments explore existing members' views and their strength of feeling towards increasing the union's membership offer. Focus groups with existing members and with reps are conducted along with a reps survey and a survey of a sample of members. To gauge the strength of feeling, the quantity of survey responses is monitored as are other metrics including email open rates and clicks.
- **Legal advice:** to understand what could be possible in terms of representation new legal advice is sought



STEP 3: ANALYSIS

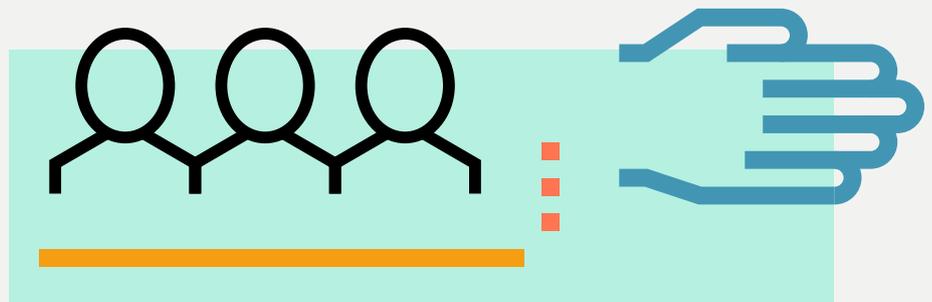
The task and finish group analyses the collected data. Their analysis shows that growth of non-professional roles and of self-employment in their sector is forecast to grow significantly. But data from members and reps highlights strong concerns about the undermining of their professional status and their terms and conditions. The task and finish group decides that further financial data is required. It asks the finance department to make an assessment of the impact if the union decided to expand its membership offer to self-employed workers. They are asked to assess the impact of potential future growth but also of decline if existing members chose to leave.

STEP 4: DECISION MAKING

Following extensive review, the task and finish group make recommendations for the NEC which outline the potential challenges and opportunities and potential membership. The NEC agrees to a small-scale project which can test key messages, membership and interest in collective bargaining among potential new members. It also initiates a larger member consultation.

STEP 5: ACTIONS

A briefing document for members is produced. As part of the consultation, an all-member survey is issued and regional consultation meetings are held. Data from the consultation is analysed, headline findings are shared with all members and in-depth information is fed back to decision makers. After assessing the small-scale project's success and with extensive deliberations it is decided that membership should be opened up and a new self-employed section should be established. This requires further research to learn from other unions that have organised self-employed workers. It also requires investment to recruit new organisers and the development of new training modules for existing organisers and reps. It requires the union's CRM to be amended and the development of new recruitment materials. All actions are kept under constant review to monitor their effectiveness.



SCENARIO 3

Reviewing the membership model

The union's categories of membership have been the same for over 10 years. Some reps report that more of their colleagues would join if fees were lower.

STEP 1: PURPOSE

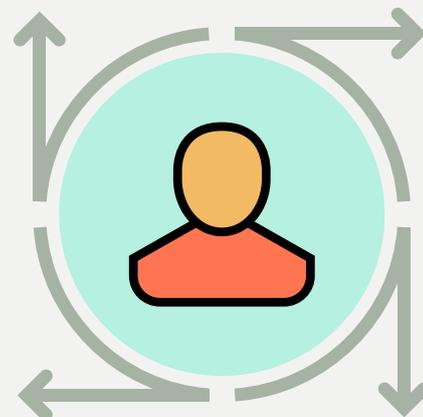
The union's strategic plan has a long-term aim to grow the union's membership which has been in steady decline. The union has not increased its membership fees for over ten years. Each year it is either in deficit or makes a small surplus which challenges another priority to be a stable and independent union. On recommendation from senior leaders, the NEC agrees to conduct a review of its membership fees and possible new membership models.

STEP 2: RESEARCH

During NEC discussions, the debate tended to rely on anecdotal evidence, so a project lead was appointed to oversee a union wide systematic approach to the issue. Each department is represented in a group that is brought together to lead the review.

- The membership department is tasked with drawing up reports that examine patterns of membership, member demographics and workplace/industry density.

- The finance department is tasked with modelling current fees and future projections for the union in scenarios ranging from large growth to large decline.
- The comms and industrial departments begin outreach work with the union's membership which collects data on how members feel about the current membership offer, what other organisations they join and their views on pricing and structures. They also do small focus groups with non-members to gain their views about joining the union.
- The review group also identifies that it needs to gather information about the price points in other union's membership models, especially in their competitor unions. The group does not have a research team but commissions an external consultant to lead a small-scale review for them.



STEP 3: ANALYSIS

Analysis of the union's membership highlights that a high number of members leave after one year. Younger members and members in workplaces with very low density are also more likely to leave soon after joining. The analysis cannot provide answers about the specific reasons why people leave because 'leavers' are not routinely asked or contacted. The analysis also highlights that many members have paid the same annual rate since joining despite the union having a tiered fee structure that is linked to salary. Data collected by the finance, comms and industrial departments is reviewed and combined with the member data to produce a report for senior leaders and the NEC.

STEP 4: DECISION MAKING

The review so far has identified that a significant minority of members feel the union's membership offer could be improved. Evidence from non-members also highlights that many are not deterred by the cost of membership but because they don't see the point of joining. Financial modelling indicates that on current trends the union will continue to have annual deficits and that these will increase over time. Overall, the findings so far don't point to a clear set of recommendations. It is felt that more information is needed. The union commits to a dual approach – to increase and retain membership and income via current members while continuing work to develop a new updated model. The NEC asks for the membership of the review group to be expanded to include more member voices.

STEP 5: ACTIONS

More research is conducted which sees the union work with Unions 21 and the TUC to learn more about the work that other unions have undertaken to review and upgrade their membership models. Over the next year, membership rates are increased by an initial 1% and rates of members leaving are closely monitored to see if the small increase has a negative effect but it does not. The union takes a small number of steps to pilot new initiatives including developing a new member journey which includes regular engagement with all new members, contacting all 'leavers', and introducing new 'net promoter' surveys that are sent to samples of the membership each month. Members are contacted via an offline/online approach to update member details and increase rates linked to existing salaries. This has limited effect so the union reviews the support to officers to see if improvements can be made to this work.

In recognition that the data it holds on many members is poor and that its membership system is difficult to extract data from, the union commits to a new long-term project to introduce a new membership system. It sets a goal of proposing a new membership model at its annual conference in two years time. In preparation it begins more detailed financial modelling research to assess the possible effects of new membership rates.

SCENARIO 4

Planning a priority campaign

A motion is passed at the union's annual conference calling for the union to run a priority campaign for better childcare provision.

STEP 1: PURPOSE

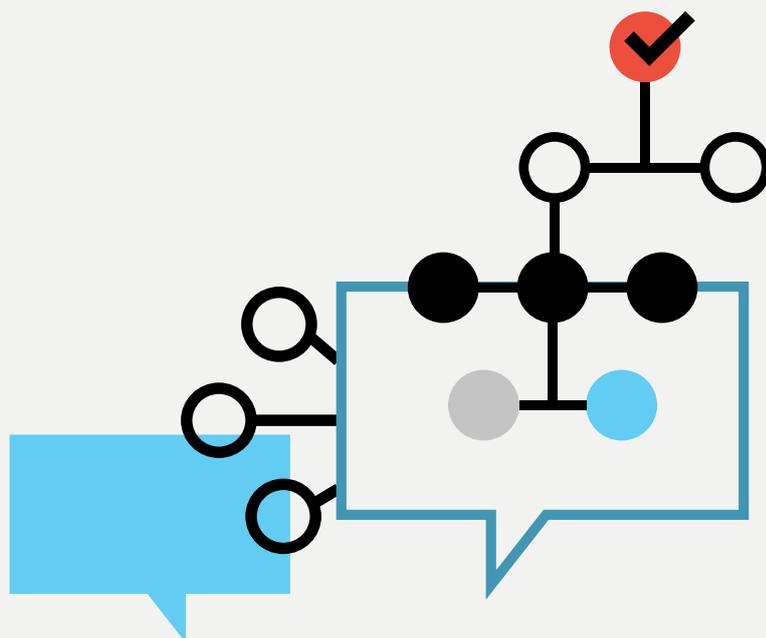
The union's purpose is to be member-led. Following annual conference, officials immediately begin work to plan when and how to organise the campaign.

STEP 2: RESEARCH

More information about the need for better childcare provision is needed. The union's internal research capacity is limited so it issues a tender for a research report to be produced. This is awarded to a group of academics with relevant expertise. The union issues an all-member survey to gain information about members' childcare costs and their experiences of childcare. Regional focus groups with members who have childcare responsibilities are held.

STEP 3: ANALYSIS

Officials produce a report drawing together key findings from the member survey and focus groups. Survey responses are cross-referenced with membership data which shows that the lowest paid members have the greatest need. The commissioned academics produce a report that draws on their analysis of a wide range of relevant data including cost of living data from the ONS; thinktank and academic research; childcare provision data from other countries; and data and reports from charities and campaign organisations with specialist childcare, early years and educational experience. Both are shared internally with officials and reps with a short survey asking for views and ideas to plan the campaign.

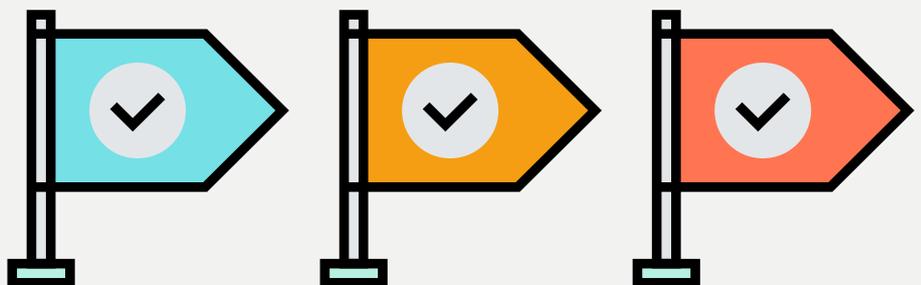


STEP 4: DECISION MAKING

A campaign action plan is developed which has long, short- and medium-term goals which relate to the union's existing priorities. It is agreed to base the campaign around the powerful stories (qualitative data) shared by members about the impact that inadequate childcare provision has on their lives. The long-term aim is securing full funding for childcare from central government which also raises conditions for workers in the sector. The immediate short-term goal is to increase support for funding by 5 hours. The union identifies clear stakeholders and allies in the campaign and works with them to establish a campaign website and develop a toolkit of actions for members and non-members to take. Key campaign messaging is tested with members and non-members to gauge its effectiveness. The union also continues to build new links with other unions, non-union organisations and politicians to build support. Reviewing the evidence leads officials to decide that a public opinion poll could be highly effective to complement existing evidence. A market research agency is commissioned.

STEP 5: ACTIONS

As the campaign is rolled out it is constantly reviewed to monitor its effectiveness and to capitalise on new opportunities. Online engagement with the campaign is analysed and the campaign website is improved accordingly. A forthcoming Spending Review by the government creates an opportunity to raise the profile of the campaign and more staff time is allocated to the campaign on a short-term basis. Officials report that a high number of backbench MPs from the main government party have engaged with the campaign and so constituency and party-specific briefings for MPs are prepared. Analysis of member and non-member engagement with the campaign reveals that most engagement has been higher in England compared to Wales, Scotland and Northern Ireland. Campaign materials are reviewed and it is decided that the focus of the campaign has been too Westminster-centric. The campaign is refocused to have a stronger emphasis on the devolved nations and also on engaging with local government.



SCENARIO 5

Exploring a potential merger

A large general union that represents members in multiple sectors is approached by a smaller union that represents workers in one industry about a possible merger. The unions have different cultures but also have a long history of collaboration.

STEP 1: PURPOSE

The union's NEC discusses the approach and agrees that a merger could provide new opportunities for growth and strengthen its influence in key industries. It agrees to investigate the possibility of a merger.

STEP 2: RESEARCH

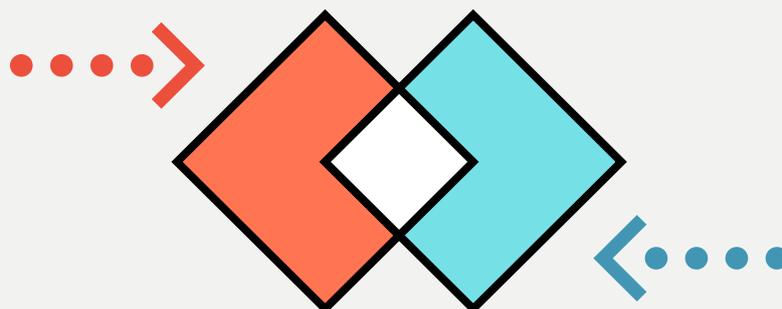
Data collection in this scenario initially involves senior officials from both unions engaging in high-level talks to understand the reasons behind the approach and discuss the opportunities that a merger could provide. In the course of this the union asks for full information to be shared about the smaller union's financial situation, its membership size and density, its infrastructure including its staff, data infrastructure and physical estate.

A small cross-department working group collaborates to produce a risk register about the potential merger. This includes risks such as the smaller union's pension fund deficit, mortgages and other financial liabilities; members leaving the smaller union if a merger goes ahead; TUPE and redundancy costs, and the impact of losing institutional knowledge and experience if staff leave.

Both unions undertake work to start monitoring member sentiment including by reviewing traditional and social media, incoming case queries and reasons for member resignations. They share this data with each other. They also undertake work to monitor press interest in a potential merger and prepare answers if the press and members ask questions.

STEP 3: ANALYSIS

The information provided by the smaller union is analysed along with the activities of the working group and a report is produced for the NEC. The analysis reveals synergies between the two union's including a similar regional structure and shared CRM. The analysis establishes that the smaller union has a healthy level of reserves but also has a significant deficit in its pension scheme. Further information is requested and talks continue.

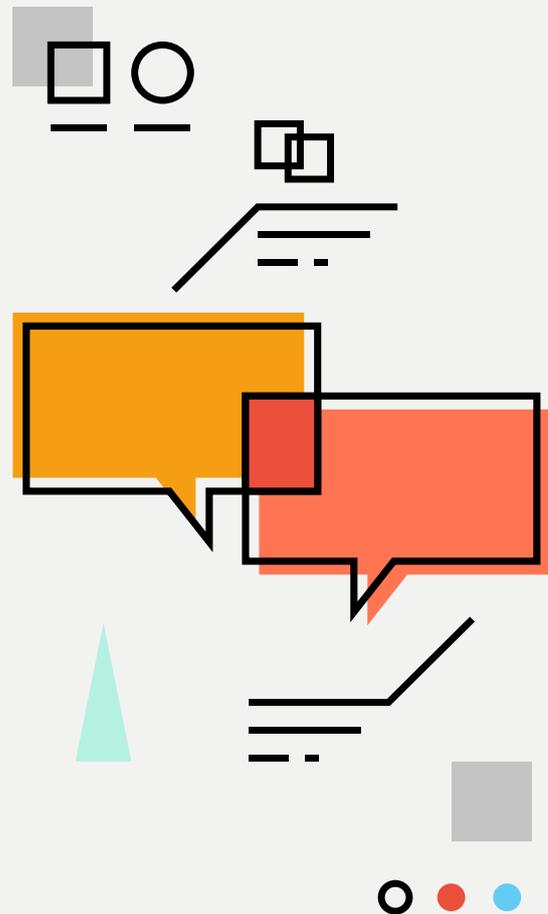


STEP 4: DECISION MAKING

The NEC meets to decide whether to pursue merger talks. It reviews talks so far and the analysis of information provided by the smaller union. It agrees to continue talks and that both unions should consult their members about the merger and that if the members back an in principle merger then a formal motion should be tabled at the next annual conference.

STEP 5: ACTIONS

Talks continue. Members of both unions are consulted but the response from both memberships is mixed. The union conducts further detailed analysis of the smaller union's pension deficit and concludes that it presents a significant financial risk. Senior leaders review the new information and member feedback and agree to halt talks for now but to remain open to a potential future merger. A strategic partnership working group between the two unions is established to deepen collaboration and to maintain open communication lines.



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