

UNION MODERNISATION FUND

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Innovation & Skills

**UNITE THE UNION
(AMICUS SECTION) – PILOTING ICT
SERVICES FOR BRANCHES**

Unite the Union (Amicus Section) – Piloting ICT services for branches

Background

During March 2005, the Amicus National Executive Committee commissioned a survey of the union's branches to understand how they could be restructured and better supported. The results of the survey and subsequent consultation exercise showed that benefits could be achieved by introducing new processes and technologies, specifically for:

- the union to operate a centralised branch support unit, where all branch-related queries and paperwork would be handled;
- branch secretaries to be provided with IT equipment and internet facilities so they could access the Amicus membership system online.

There were also to be a number of other 'value added' initiatives, which could be achieved by simply delivering basic ICT solutions (such as email, internet and forums). A conceptual 'standard, shrink-wrapped solution' was defined, including equipment, training and ongoing services, to meet the needs of branch secretaries. The Union Modernisation Fund (UMF) grant was allocated to support a pilot project to introduce enhanced IT services into union branches.

As soon as the shared funding package was awarded, a project team was formed and a Project Initiation Document (PID) was created. The PID contained the details of the team, project structure and organisation – and served as a framework for the project.

Why this project?

The overarching rationale behind the project was to improve the operation of the union's branch structure by streamlining and enriching information flow. By introducing technology, branch secretaries would be able to communicate more effectively with each other as well as with branch members.

It was also clear that branch secretaries need to operate within a set of clearly defined guidelines. An important part of the project rationale was to ensure that all those who participated were made aware of their responsibilities in their position, effectively being given a job description.

It was believed that by introducing these initiatives a better end-to-end communication chain would be achieved and there would be a much less inhibited flow of information from inside the union, right through to the individual members in the participating branches.

Aims and objectives

The following 'high level' aims were identified:

- Enable branch secretaries to communicate with lay branch members more frequently and effectively, providing up-to-date information quickly and economically.
- Develop ways to enhance engagement and participation of lay branch members.
- Provide access to an interactive membership records system via the Union's website.

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- Enable branch secretaries to exchange information or comments and discuss the engagement strategies related to the project by providing an online discussion board facility.
- Develop the skills and competence of branch secretaries to facilitate a cultural shift in the style and inclusiveness of branch meetings.
- Establish a branch support unit as a one-stop shop for advice, support and guidance for branch secretaries.
- Evaluate the effectiveness of IT solutions to enhance and improve the quality of branch activities, as part of evaluating a wider programme of engagement strategies and branch development that were necessary as the union prepares for a potential merger with two other large unions.
- Quantity of paperwork sent to pilot branches reduced by at least 50 per cent by the end of the pilot project.
- Comprehensive training needs survey of all pilot branch secretaries completed by September 2006.
- Weekly email news bulletin produced, providing information on issues relevant to the branch community.
- Branch support unit established by April 2007 to provide ongoing support and advice for branch secretaries.
- 10 per cent of pilot branches experimenting with holding meetings at different times and venues.
- Levels of engagement and participation of the branch community increased – to be measured through regular audits of:
 - attendance levels at branch meetings;
 - amount of communication from branch secretaries to members;
 - amount of communication between branch secretaries and the union's head office;
 - levels of involvement with the local community;
 - numbers of membership record changes and views;
 - use of online system for allocating branch payers' subscriptions;
 - use of discussion board.

Completing the project would also achieve 'low level' objectives such as:

- Increasing levels of engagement and participation of the branch community in branch activities.
- Evaluating the effectiveness of IT solutions to enhance and improve the quality of branch activities.
- Improving the efficiency of communication between branches and the union's head office by enabling online updating and access to the records of branch members (whilst observing data protection issues).
- Identifying the skills and competencies required for a modern branch secretary to carry out their role effectively.

A timeline was set for the project, including:

- Discussion board for branch engagement and participation strategies to be up and running by June 2006, with a target of 50 per cent regularly using the facility.

Supplier relationships

The ICT hardware purchase process for the project was undertaken on the basis of a one-off supplier bid. To achieve the best value, quotes were obtained from a number of hardware suppliers to provide a predefined kit list containing specific products in specific configurations. An open book accounting process was used when the bid responses were considered, to ensure that the profit levels being sought by the suppliers were fair and just. On selection of the winning bid an order was placed for the total kit requirement, which was duly delivered and held in stock by Amicus until the equipment was distributed through the rollout process.

Software development services were provided by dovetailing with existing systems. The additional work required to provide for the UMF project was bundled in with the development of the new customer relationship management (CRM) system and related interfaces. Dominic Hook, Director of ICT, Unite (Amicus Section), explains:

'By taking this approach we were able to realise cost efficiencies that were directly applied to the project's bottom line. Regular meetings were held with the software developers during the development phase. However, high levels of demand for broadband connections meant that close attention was required to ensure the telecoms prerequisites were delivered on time without impacting on subsequent tasks. Amicus already had an established supplier relationship with BT for provision of voice and data networking services across the organisation. The same account management and billing facilities provided for our day-to-day BT services were also leveraged to provide the solutions required by the UMF project, with the Project Administrator managing the installation of services with BT.'

'Throughout the project lifecycle, BERR were extremely supportive of the process and always happy to provide advice and guidance. Project management at this level is still being adopted in the trade union sector and the need to monitor costs closely and keep to strict timelines is ever more apparent. There is no doubt that unions can benefit from this type of experience.'

The role of BERR

Dominic Hook, Director of IT, praises the role of BERR through the project:

During the rollout process for the pilot, Amicus began a parallel program to replace the union's membership system with a more flexible and up-to-date package. Replacing the membership system meant that a significant rewrite of the software was required, including a redesign and complete redevelopment of the My Amicus portal. Although this impacted on the UMF project, time was gained back by being able to undertake some of the parallel tasks ahead of time.

Outcomes

The pilot project's success was defined by the achievement of its high and low level aims and objectives. It has provided invaluable new facilities:

- The pilot enabled a number of Branch Secretaries that were previously not IT oriented the opportunity to make a start in the world of computing. New users have now the ability to use simple office productivity applications and printing equipment to begin to create standardised document templates, thus reducing the overhead associated with producing correspondence runs. Ongoing

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usage will further allow users to continue developing their IT skills.

- Under the banner of the Amicus ICT Helpdesk, branch secretaries now have access to a range of support services. Initially the Helpdesk was used simply to provide IT based support for the pilot project equipment and services, but was later extended to allow escalation of issues to the union's internal departments such as Member Services and provide access to the skills and knowledge of full time union officers.
- A common role description has been defined and provided to all branch secretaries involved in the pilot. As well as describing the actual tasks that are carried out, the new role description addresses how and when communications between the union and its lay members should occur through the branch structure, including the appropriate use of equipment and services provided through the pilot project.
- Above all other services, the introduction of email services has provided an efficient method for branch secretaries to communicate one to one, or one to many. Communications are now instant and, where required, much more secure. Exchanges of correspondence that could previously take many days or even weeks to complete can now be undertaken in minutes, providing a much better way of answering queries or simply communicating information.'
- Although not used as much as the email services, the discussion board function has provided a central location where branch secretaries and lay members can meet to discuss all aspects of the union's causes, branch management and in the case of the pilot, monitor its progress.
- The web-based discussion forums provide a platform for lay members to converse on subjects relating to the union as a whole and its day-to-day operation. These 'free speech' arenas

promote openness and cultivate many new ideas. Although the initial uptake was stifled by the availability of email, it is thought that use of the forums will grow over time as more people outside the pilot become aware of the solution and begin using them.

- The Branch Support Unit function now also provides a contact point for branch secretaries, which was never available before the pilot. It is envisaged that the service will continue to be developed and will eventually become the default gateway through which branches communicate with the union's internal departments.
- Once the project elements were complete, one- or two-day training sessions on the new technologies were offered to branch secretaries, alongside ad hoc training offered by the engineers installing the equipment. These were taken up by those who were not confident enough in their existing IT skills to be able to make the most of the new equipment and services provided by the pilot project. Even the ability to use simple office productivity applications and printing equipment has enabled these new users to begin creating standardised document templates, thus reducing the overhead associated with producing correspondence runs. It is anticipated that ongoing use of the equipment and services will further allow users to develop their IT skills and make better use of the offerings.

Evaluation

Participant surveys were used subsequently to gauge the project's success – and they showed considerable benefits for branch secretaries. Email was felt to be by far the best service offered by the pilot project. Nearly 80 per cent of branch secretaries have now begun to use email to contact each other and branch members – not wholly unexpected given the widespread use of the medium and its ease of use.

Levels of communication and interactivity have also been improved through the pilot. In particular, IT services allow branch secretaries to communicate better both with individual members and with the branch membership as a whole.

To help determine what went particularly well and what did not work, a range of free response questions were posed to the project audience. Responses showed that:

- around 80 per cent of users were confident about using the equipment provided by the pilot project;
- a number of respondents suggested training covering advanced use of the My Amicus portal would help them make further use of its features;
- around 85 per cent said email was the most useful tool for basic communications and correspondence, helping them in their role as branch secretary;
- around 30 per cent found the forums useful (although generally not more useful than email);
- around half used the forums at least once a month;
- around 60 per cent accessed the Branch Support function. All of these were more than pleased with the attention their problem received.

Lessons learned

The project team highlighted the following lessons learned:

- Surveys must be brief and to the point. Participants need to receive some form of inspiration for completing surveys and returning them on time – particularly true of paper-based surveys.
- Training must be a mandatory part of the pilot process and all participants must attend at least a pilot overview meeting where they are advised of the salient points relating to their participation.
- It is better to postpone a project than try to implement two initiatives based on the same ICT systems. Co-development of a similar solution using the same system causes confusion between project teams and consultants/developers.
- Email can be viewed as a 'cure all' to participants who have not used it before. The benefits of other collaborative tools such as forums and chat rooms should be promoted as part of the training process and the features/benefits of each communications medium should be clearly explained.
- Instead of setting fixed dates for large attendance training courses, a number of smaller training courses should be provided spread over a longer time period.
- Project Steering Group delegates should be accessible and have enough time to give to the task. Using the most senior of staff is often a mistake as they do not have time to attend frequent meetings.
- Participant Contracts should always accompany an invitation to participate in a pilot project. By signing up in this fashion participants fully understand their responsibilities as well as their entitlements before the pilot commences.

- Closed (multiple choice) questioning is more effective in surveys where levels of achievement need to be measured. Open questions with freeform answers are fine if a viewpoint is required, but respondents will generally use one-word answers for positive replies and many sentences for negative feedback.
- The telephone is the best medium for surveys. Questions in written and online surveys are open to interpretation and you may not get the answer you expect. Obtaining an answer through conversation is easier as two-way prompting ensures that the question gets answered in the most appropriate fashion.
- Using videoconferencing systems makes project team members more accessible. In a pilot such as this, video communication allowed people located in geographically diverse places to come together to meet and discuss progress and initiatives.
- Smaller, more frequent training courses are better than larger, fixed date engagements. Training courses for pilot projects should also allow time for freeform discussion and trainer interaction with individual issues.

Looking forward

It is important to remember that this UMF project was a pilot. Further considerations will now be undertaken over the coming months and years to decide how the union's branch structure could be better served by providing ICT facilities.

A number of interesting outputs were realised through the pilot, many of which show that the introduction of ICT into branches may well be a drawn out process. There is also the ongoing consideration concerning funding of such activities. The Amicus merger with the TGWU casts a fresh light and brings a whole new range of possibilities that were not considered previously.

Benefits

The benefits of the project have been considerable, as Dominic Hook says:

'Communication is the lifeblood of the branch structure. The pilot has provided the tools and training needed to allow branch secretaries to provide information to lay members in a fast and effective manner. Increasing the number of communication media available to lay members means that there are more ways of making contact. The ongoing growth of the internet as a cost effective communications medium has underpinned the pilot and provided up-to-date services for communicating news, events and administrative processes that may be of interest to members, incurring only a fraction of the costs previously associated with such activities.'

'Without doubt, the introduction of IT services into the Amicus branch structure has also brought significant operational performance gains to the participants involved in the pilot project.'

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