

UNION MODERNISATION FUND

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**THE BAKERS, FOOD AND ALLIED
WORKERS UNION – BUILDING THEIR
MODERNISATION AGENDA**

The Bakers, Food and Allied Workers Union – building their modernisation agenda

Introduction

BFAWU benefited from Union Modernisation Fund support for two projects in Round 1 – one focusing on membership diversity and the other on systems and communications. BFAWU is a relatively small union, with a basic level of resource to invest in infrastructure. While they were committed to progressing recommendations from their Round 1 projects, the financial and staff-time cost of doing so was a significant burden for such a small union. UMF funding in Round 2, however, would mean that they could maximise the benefits and move forward their modernising agenda.

One of the key findings of the membership diversity project was the feedback that members want and expect information that is more focused on their particular issues and priorities, including communications in specific languages. The systems and communications project confirmed the need for membership and admin systems that can identify specific groups and also monitor the profile of the union to measure participation by minority groups. BFAWU acted on these project outcomes by purchasing a new membership system that can deliver these priorities. For their Round 2 UMF project, they wanted to capitalise on the buy in from stakeholders and develop a training and buy-in programme for lay users at local level, delivered on a regional basis – essential if they were to optimise participation. They also intended to conduct a major exercise to populate their new system with the information necessary for membership

profiling. In addition, UMF funding would enable a professional data cleanse and collection service.

Why this project?

Buying the new membership system had been a major step for a small union like BFAWU and they wanted to ensure that they gained maximum return for their investment. Adrian Stewart, BFAWU Financial Controller, explains:

'We are committed to modernising our systems and to delivering more targeted services to our members. To do this we recognised that we needed to train staff and lay members to use the new system, populate it with better, more accurate data, and build support for its wider use. One of the reasons we undertook the systems and communications project was to come up with a system that met the needs of the stakeholders who will actually use it – we wanted to get it right. And an important element of the feedback in that project was that lay officers and activists wanted the ability to use the system directly. We also identified that we would need to build buy in for the new processes and, in particular, for the approach to membership profiling and monitoring.'

Consequently, it was agreed that the Round 2 project would comprise the design and delivery of a bespoke training programme to, initially, branch activists on the use of the new membership system and membership related processes. Alongside this, the quality and quantity of information held on the membership system would be improved,

so that the union could communicate better with members. Project objectives therefore included:

- design of a specific training module based on the new membership system
- engagement of activists in new processes and membership profiling
- delivery of the module to 60 per cent of branch activists
- updated and cleansed information for 50 per cent of existing data
- expanded information to include ethnic and gender classification for 10 per cent of membership
- recommendations for further action to build on outcomes of the project for the future

Methodology and outcomes

A project team was established, which included the Finance Controller/Project Manager, who has direct responsibility for the project, the General Secretary, the National President, a regional organiser; two membership clerks, and two lay activists. In addition, it was agreed that specialist input would be co-opted as required.

Membership data

Existing membership records were limited and, in many cases, inaccurate and insufficient. Amendments were made such as data fields in each member record for membership start date, expiry date and expiry reason. It had also been noted by full-time staff monitoring use of the new system by branch activists that a duplicate membership record would occasionally appear in branch records when the relevant branch representative couldn't find a member on the system and wanted to update information held about them. As a result of this anomaly, the system

was amended by the developers to check for duplicates when new members are added. A new membership application form was created in parallel with the new profiling fields added to the system to help the union capture additional information from new recruits. An update form is now also distributed via the member magazine, *Foodworker*.

Around 120,000 old records have now been expunged from the system, with 32,000 live records now in place. More than 7,000 new member records have so far been processed and ethnic classification has been captured on over 50 per cent of new joiners:

Training module

The union recognised that they did not have the resources or expertise in house to deliver the training support on the scale they needed, and it made sense to use a supplier with experience of working with trade unions. Consequently, they approached GFTU to work with them to develop and deliver training. (Particularly useful was GFTU's mobile training unit, which meant that the project could be delivered in the workplace or other local venue if necessary.)

The training included enhancing communication skills and equipping branch activists with the knowledge and skills to process membership records, monitor and profile membership at local level. A training manual/user guide was also produced to sit alongside the training programme, distributed to all participants.

The course not only introduced activists to the new processes, but also focused on why the union needs information to operate effectively, particularly in an ever more diverse workplace.

The training programme and manual were tested with some of the union's membership clerks and, after amendments were taken on board, rolled out to activists

and officers. Similarly, as the training progressed, some minor alterations were made to the system and training manual/user guide following suggestions from users. With the co-operation of the company commissioned to design the membership system, a web-based training platform was also established alongside the live web-based system to allow activists and officers undertaking the training programme to get a real feel for the system.

A total of 14 training events took place across nine locations in England and Wales between May and November 2008, with a total of 119 participants. Says Adrian Stewart:

'The training module, and the new membership system and processes, have been well received by participants. There was, and still is, resistance in some sections of the union to giving the data. Once on board, though, activists have been extremely enthusiastic about using the system and regularly entering and updating data. The exercise has been excellent in building relationships and respect between activists and the union's central structures.'

Benefits

Adrian Stewart believes that the UMF project has 'provided a catalyst for real and lasting change on a number of levels, from the services the union provides to members, to the ability to engage members and activists more effectively'. What's more, the impact has been multiplied by the link made across both UMF funding rounds. In terms of two-way communications:

- The membership system has meant that communication to individual members is fast, accurate and individualised. Previously it would have been delegated to the branch to get the message out using their own methods – which could add two to three weeks to the process.

- The union is now able to produce personalised membership cards with a turnaround of one week – previously they had to send out blank cards to members as there was little reliable information held centrally.

In terms of the ability of the union to respond to increasing diversity of the labour market and to supply services geared to the needs of a diverse membership:

- The information gathered (nearly 6,000 members have submitted a complete set of demographic data) means that services can be targeted and developed appropriately – for example, it is intended that information to dyslexic members will be sent out on coloured paper, and their details will be linked to the services offered by the learning department.
- The concentrations of ethnic minorities or minority language groups have now been mapped – so services can now be targeted around translation and language skills in consultation with the branches.

Looking at developing the professional competence of union officers and applying modern management methods to the running of unions as efficient, outward looking and flexible organisations:

- Officers are now 'better informed about the membership and their needs than they have ever been', which has meant that the union can be more responsive in dealing with the membership.
- The efficiency savings made by using this system have not yet been quantified but 'on an objective level it is making the job of being professional and outward looking much easier'. The union now has a set of processes in place that lend themselves to developing and targeting services and resources strategically – already apparent in the union's financial planning, service delivery, service development and engagement with members.

Says Adrian Stewart:

'Before the implementation of the new membership system, it was almost impossible to quickly assess vital information such as how many members the union currently has overall or in one particular area. The processes for gathering data were ad hoc and built on precedent. In effect there were some 200 activists gathering data around the country in their own fashion, with only basic recognition of common practice. This impacted on the union in terms of financial planning and modelling, membership communication, development and delivery of services, provision of benefits, accessibility, and our ability to run targeted engagement events. One real benefit of the project has been in working with activists on why gathering information is not only important but is actually the key to making the union better and stronger for members, with a pay off in terms of usage. The knowledge they've gained is being used constantly to ensure we have the information available at a national and local level to improve two-way communication with union members. Activists are now regularly accessing and updating the system with new member details.'

While the purchase of the new membership system was not included in the scope of the UMF bid, Adrian Stewart does recognise that the benefits of the system would not have been realised without UMF support to train activists and officials in the use of the system and in 'cleansing' data transferred to it from the old membership system:

'Branch officials can now update records at a central point which immediately informs our membership clerks and vice versa. Local and national membership reports, such as all members under the age of 25, can be produced by those trained and subsequently approved to use the system. This has and will continue to revolutionise the opportunities available at a national and local level in terms of targeted communications

with members. It will also make some of our administrative functions more efficient. For example, with a member's claim for sick benefit from the union, where membership clerks process the claim, branch officials will now be able to check to see how the administrative process is progressing via the membership records system.'

Joe Marino, General Secretary, BFAWU, shares Adrian Stewart's enthusiasm:

'Our communication systems with branches, activists and members are now 100 per cent better than they were. We are grateful for the support that the Union Modernisation Fund has given us and will continue to improve our contact and relationship with members.'

Lessons learned

There have been a number of important lessons that the union has been exposed to during this project:

- **Gathering personal information from established members** – During the project the union met with resistance from a number of members unhappy about answering questions, particularly on ethnicity. The fear seemed to be about the union using the information to discriminate – either positively or negatively. The sensitivity does not occur in new joiners who, being new to the union, accept the questions as entirely reasonable. *'Had we anticipated the difficulty we could have segmented our communications and approach to long established members. This is something we are retrospectively doing, ensuring that members can see the benefit of giving this information to the union.'*
- **Project management practice** – The union has learned an important process lesson having adopted the project management structure set out in the bid process. *'The emphasis in this UMF Round on objectives, measured outcomes and time line deliverables has been a cultural lesson to the senior management of the*

union. The processes that were adopted in the UMF project are now used in the everyday planning that goes on within the union.'

- **Development and roll-out of the training module** – Issues arose, beyond the control of the union, which delayed the initial testing of the new system and the development of the training manual/user guide, with subsequent unforeseeable delays. *'Building in contingency to allow for hitches is crucial to ensure that deadlines are met.'*

Looking ahead

Its new system up and running and all targets on the way to being met, the union has made recommendations to continue with membership data updates, expanding the data capture processes and maintaining the membership system knowledge.

Membership update forms will be distributed at all union events, including training sessions, conferences and regional councils. The union is looking to expand the profiling data held, building into the system a method of capturing union activity and interaction by members, such as attendance at conferences or training events, as well as the ability to capture information relating to legal claims being progressed or considered by the union on members' behalf. Trained activists and officers will be kept up to date with amendments and developments to the membership system. The use of the membership system will be monitored by those trained in its use in order to target refresher courses to those not making full use of the system's capabilities.

Adrian Stewart explains:

'We have already agreed to continue with the training programme and will, as a priority, roll it out to activists and officials in our branches in Northern and Southern Ireland, which were excluded from the scope of the UMF project. We are also currently in talks with GFTU about the

delivery of a training-the-trainers programme, which would enable activists and officials in our regions to provide training to others, either one-to-one or in small groups, on the use of the system. A programme of this nature will be necessary in order to ensure that new activists and officials are making use of the system and that member records are kept up to date. It will go some way to addressing the 34 per cent of activists who have not taken part in the training – it will also ensure that the knowledge of the system is disseminated as widely as possible. This is key to ensuring sustainability, the Union is well aware of the need to maintain our capability and build on the work that has taken place in this project. We are also currently looking at innovative, cost-neutral ways in which we can quickly 'cleanse' and update the remaining 20,000 records on our membership system. We view this as a priority and will, if required, devote financial resources towards its completion.'

Conclusion

Adrian Stewart sums up:

'BFAWU will become more efficient and more responsive as a result of this project. The change in our ways of working and communicating with members will be huge. The project outcomes will become part of the very fabric of the union. The new membership system will be the tool upon which we build our whole communications strategy. It will also give us the means to measure progress on issues such as levels of participation, membership profile and activist profile. We will have a level of information about the union that will give credibility to the process of change we are implementing.'

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