

UNION MODERNISATION FUND

BERR

Department for Business
Enterprise & Regulatory Reform

NATIONWIDE GROUP STAFF UNION (NGSU)

Nationwide Group Staff Union
– two-way communications
empower members

CASE STUDY

Nationwide Group Staff Union – two-way communications empower members

The Nationwide Group Staff Union (NGSU) has used Union Modernisation Fund (UMF) funding to develop an interactive internet site, which has transformed the way the union and its members communicate. The results have paid dividends, as Tim Rose, NGSU Assistant General Secretary (Services), explains:

'Our participation in the UMF has delivered more than just a financial input. What is clear is that the project has been truly transformational. We have added value in so many ways and in just a short space of time our website has become a primary communication channel. It has delivered benefits such as better services for members, two-way communication and speed of delivering messages to members, and has led to cost savings. This means that the union is better equipped to meet the challenges ahead and support the needs of our members. Union officers have benefited from the implementation of the project, acquiring new skills in project management,

website development and interaction with other unions through the dissemination process. This has been a positive experience and one which we would encourage other unions to participate in.'

Background

A survey of NGSU members and a review of communication by the National Executive Committee (NEC) had highlighted the need to improve the union's internet presence and help empower members to have more of a say in the union's work. But financial constraints and lack of in-house expertise had meant that the union simply wasn't in a position to go ahead and develop the new website that was needed.

Nationwide Group Staff Union (NGSU)

- An independent trade union representing employees of Nationwide Building Society and its subsidiary companies.
- Around 13,000 members, representing over 70% of Nationwide's workforce, working in 680 branch offices, four regional admin centres and regional call centres and mortgage centres.
- A small team of employed union officers, plus some individual cases officers who work from Nationwide offices or home to provide regional support network for members.
- Around 150 representatives, including executive officers, constituency representatives and safety officers, plus four advisory committees (open to all union members), which promote diversity and equality issues.

The launch of the UMF proved the ideal opportunity to give the project the green light. A feasibility study was carried out to see whether it was possible to create a website that would fit the bill but still be affordable, since the union had to match any UMF-approved funding. Initial discussions were held with several website developers and a potential provider identified. The next step was to ensure that the project could comply with the rigorous demands of the UMF – particularly that it should be 'transformational' to the work of the union and of interest to the wider union movement as a whole. Says Tim Rose:

'The critical factor in deciding to submit a bid to the UMF was the need to modernise the way the union communicates with members. We determined that this was essential if we were to encourage them to become active and so give them more empowerment to shape the work of the

union. And we were delighted that our bid for £5,800 towards development costs was approved by the UMF board.'

The project was launched in March 2006 and all development work has now been completed. But it's not over yet:

'The real work begins now: using the functionality of the website to meet our objective of activating our membership. The early signs are encouraging and we have already had considerable successes. The number of 'hits' to the website, for instance, has far exceeded expectations, with daily hits now around 50% up on previous totals.'

Project aims and objectives

- The website to be the main channel of communication.
- To encourage two-way communication.
- For efficiency and cost savings.

Why this project?

There were a number of factors driving the need for the union to develop a new website:

- Responding to members' needs
- Geographical constraints
- Employee Involvement Committees (EIC)
- Cost savings

Responding to members' needs

First and foremost was the union's desire to make sure they continue to meet members' needs and to provide the services they want in the most effective way. But why the internet? Tim Rose explains:

'It was our members who told us they wanted better access to information via the web. The majority of Nationwide's employees have regular access to a desktop PC and are used to accessing information from the company intranet. It was natural for them to expect to be able to access information from the union in the same way.'

The union did have a website but it was very out of date (both in content and style) and wasn't interactive – members could read information on it but that was about all. The website had been developed by a retired member of staff and the union had no one with the expertise to make radical changes to its content and structure. They needed to make the website a resource that would become the first port of call for members and representatives wanting information about union services and the latest news and communications, such as the monthly newsletter. It would also provide access for representatives to training material and other useful information, such as forms and posters.

Geographical constraints

NGSU members work all over the UK. This geographical spread, combined with work pressures, makes it very difficult for union officers and reps to engage with members as often as they'd like. So the prospect of being able to communicate online with members (and for them to communicate with each other) was very attractive.

Employee Involvement Committees (EIC)

Just over a year ago the union launched a new employee involvement initiative with Nationwide, establishing eight committees looking at different aspects of the working environment. These committees bring union

reps together with senior managers to discuss issues such as training, diversity, employment policies, pensions, rewards and operational issues. Having an effective two-way communication channel between reps and members would not only enable them to share news and views with each other; it would also help ensure that the issues brought to the committees would be relevant to members – and so make a real difference to the workplace. So the advantages of having an interactive website to support the EIC initiative was very clear: it would enable union reps to present issues to the membership and receive feedback.

Cost savings

Although it wasn't a major objective, the prospect of making savings through modernisation was also attractive to the union. Using a website as the main communication meant that paper-based communications would be able to be replaced with electronic communication, thus saving printing and postage costs.

'We want members to get involved with the work of the union and giving them the ability to do so easily is the key to helping them to be active and empowered.'

Website key features and design principles

The layout, navigation and functionality of the website were developed with an external firm of website developers, HeadRed. The site development was structured into three stages:

Stage 1: New website design and navigation and transfer of existing material into the new format

The basic development of the new website happened quite quickly and was signed off well within the deadline. It was decided to launch the site immediately – partly so that everyone could get started on using it as a communication channel, with useful feedback from members, and partly so that any teething problems could be spotted and adjustments made early on while the web developers were still available. Launching extra features as they went live, such as a forum for members to exchange views, produced new opportunities to promote the website to members throughout the year.

‘There is no doubt that these past 12 months have seen a transformational change to the way we communicate with members. The website is well on the way to becoming our primary communication channel. The number of visitor hits has exceeded our expectations and confirmed that internet based communication is something that our membership values.’

The website launch was announced to members in the union’s monthly newsletter, Union Mail, giving an overview of the site and highlighting key features under development.

■ Website design

The website design is ‘clean’ and ‘uncluttered’ to give a fresh, modern feel. The style is purposely distinctive so that it can easily be recognised and incorporated into other communications at a later stage.

The new website is structured into three areas:

- Information for all visitors
- Information for members
- Information for representatives

Each area is colour coded, so users can quickly and easily differentiate between them and navigate their way around the site.

The home page has a number of ‘dynamic’ boxes, which draw visitors to specific areas of the website and promote topical items. A ‘scrolling news’ facility allows visitors to track recent announcements, such as the issue of the latest newsletter. A ‘flash’ box (moving image) adds further interest and promotes key features of the site.

Access to some information, such as member benefits, is password controlled, which adds value for members (only they can access certain information), protects sensitive information (such as Nationwide’s employment policies) and means that participation in the interactive features can be tracked, so the union can see how popular they are.

A key requirement of the design was that it should comply with the latest best practice relating to disabled users, so the ‘bobby’ test, a commercial Windows-based tool to analyse web pages for their accessibility to people with disabilities, is applied at regular intervals to ensure that the site continues to meet the appropriate standards. (For more on the bobby test, visit <http://bobby.watchfire.com>)

Stage 2: Development of an interactive forum

The new interactive forum is an online chat room. Members must register and agree to ‘house rules’ to have access to the forum and then are able to read, post topics and reply to existing topics. Topics can be on any subject, work-related or of general interest.

The forum is regularly checked to ensure that no inappropriate blogging is taking place – to date only one entry has been modified by the forum administrator.

Currently all registered users can see and use this ‘general members’ forum’. But there is also the capability to run a number of ‘restricted access’ forums, which only authorised members or representatives can see and use. At the moment, each of the union’s advisory committees (groups that advise the NEC on diversity issues – ethnicity; disability; LGBT and age) has its own restricted access forum, as do constituency reps and safety reps.

If they want to access the forum, members need both to log on to the member areas of the website and then again onto the forum itself, so anyone abusing the system can be identified by authorised moderators and blocked from further access. Registering onto the forum also means a member accepting the ‘house rules’, which set out a code of practice for use.

The forum

- There were 938 registered forum users as at the end of September 2007 (just over 5% of members).
- 66 different ‘topics’ were posted to the general members forum.
- The number of replies to topics was 230.
- These had been ‘read’ 6,525 times.
- The issues raised varied included:
 - concerns about pay
 - specific work-related issues such as balancing branch tills and the cost of union membership (which seems to be considered good value by those posting replies!)
- 60 topics were posted in the ‘restricted forums’, for reps; safety reps and members of the advisory committees.

- The safety reps forum is the most used restricted forum, with most topics posted by the Union’s health and safety coordinator, providing information on new issues or requesting feedback from reps.

Use of the forum suggests that some people are more comfortable with this feature than others – there are some regular contributors and the majority of users seem content just to read others’ comments. Tim Rose acknowledges that it has been slow to take off but adds:

‘Some of the debate on the forum has been pleasing – particularly how members have used it to seek advice and support from other members. And we have been able to identify inconsistencies in the way overtime arrangements are being applied in different branches, presenting the information to Nationwide and seeking a solution. We’re also starting to see the potential of using the forum as a research tool, for example, asking members to provide information on topics, most recently to validate some regional benchmarking of salaries. Even when the forum is used primarily to read other people’s contributions, this is still giving value by providing information and stimulating debate back in the workplace.’

Stage 3: Development of an interactive questionnaire and survey facility

Interactive online questionnaires and surveys can now be run and other information collected. For example, members can use the facility to submit motions for consideration at the union's biennial conference. Information can now be gathered online and used to build detailed questionnaires, both 'free text', and 'quick polls' – a single question requiring a 'yes' or 'no' answer, whose results members can now see immediately.

A Pay and Benefits survey generated the biggest response – a return by 4% of the membership. But the headline figures do not tell the whole story. With the pay survey the union captured powerful feedback from over 1,000 members in answer to questions about rewarding loyalty and comments on pay in general. This far exceeds feedback collected through other consultation channels, such as Representative Council meetings. What's more, the quality and quantity of comments have identified some key issues in advance of this year's pay review and will make a significant contribution to that process.

Results

The union met all of the objectives set for the project. Specifically:

■ More 'hits'

As Tim Rose mentioned earlier, the response to the new website has surpassed all forecasts. Daily 'hits' have gone up by around 50%, with a steep increase when the forum was launched and another when information was released about the proposed merger between Nationwide and Portman Building Societies. The most visited pages have been:

1. The forum
2. Member and benefit services
3. Union Mail (the monthly newsletter)
4. Personnel manual
5. Join-online application form

■ Better regarded website

Another key measure of success was for more members to rate the website 'Good' or 'Excellent' – a goal soon achieved. In February 2006, just 8% had rated the old website 'Excellent'; six months later and the new site was rated 'Excellent' by 56% of users, with a further 22% rating it 'Good', thus producing a combined Good/Excellent rating of 78%.

■ Take up of services

Since the launch of the website, the number of members asking for individual representation has increased, although this is also a reaction to changes in working practices and attitudes within Nationwide, and can't be entirely attributed to increased awareness of the services via the website. It was hoped that more visitors to the website would mean improved take-up of union services and benefits. This was to be measured through an increase in the commission received from third-party suppliers who provide discount products to NGSU members. In fact, the commission received only increased significantly for one benefit (a discount on airport parking charges), although in some cases a previous declining trend was halted and increased awareness of the benefit via the website may have had some impact on this. Of services that don't involve a commission return, there was an increase in the number of calls to a legal help telephone number.

■ Efficiencies and savings

As an added benefit, Nationwide agreed to allow its personnel manual to be published in full on the website, which means that members can access details of the current

terms and conditions from the privacy of home via the NGSU website. For union officers, that access is a huge benefit as it enables queries to be dealt with quickly and efficiently – so it helps save time and provides a better service for members.

'The website has become a valuable resource for union members and reps, as well as being a communication channel for members.'

The website also provides a range of useful information for union reps, including the training portfolio, forms and posters, and a timetable of meetings. Area Council meeting agendas and minutes are also available online, which has led to some print and postage savings.

In a further move towards modernising the union, a spin-off from the website project has been the creation of two new forms of electronic communication – an email newsletter (emailed to over 3,500 members) and a digital magazine – to replace a paper-based magazine. The email newsletter is sent monthly, timed with the publication of Union Mail, and has items that link back into the website, for example, promoting a service or benefit. This encourages members to access further information from the website and helps to familiarise them with what's available to them there. Since e-Rapport, the new digital version of the union's magazine, is available to all members on the website, it was decided to reduce the paper-based Rapport to two editions a year, saving over £5,000 in postage and printing costs alone. Like the email newsletter, e-Rapport contains links to other parts of the website and so encourages members to use the site.

'Both the e-mail newsletter and e-Rapport will play an important part of our strategy of modernising Union communication and will be key to the overall success of the website.'

Tim sums up:

'Feedback from NEC members has been extremely positive and suggests that the website has helped to increase awareness of union activity and raise our profile with Nationwide's employees as a whole. The analysis of visitor hits suggests that members are beginning to refer to the website for information – we saw a spike of activity when information was released about the proposed merger, for instance. The website has improved two-way communication with members and put more of them in touch with the work of the union.'

Feedback from reps

The feedback from union reps has been extremely positive. As well as providing an online resource for training and meeting information, the website is being used in recruiting new members. Using the site as a presentation tool, reps can talk through key features of the union services and show what a valuable information resource the website is. Tim Rose explains:

'They like being able to promote the union as a modern and efficient organisation. The on-line application facility has also helped the recruitment process, as it provides an easy and instant way to join – whereas application forms handed out at induction sessions tend to get lost at the bottom of drawers!'

What's made the project work?

Tim's checklist:

■ Support from Nationwide

All employees had access to the company intranet but not wider internet access – so permission had to be sought to allow access through the internet 'firewall'. Tim Rose sees this as absolutely crucial:

'Persuading Nationwide to give access to the site from all workplace PCs has been critical to the success of the site. It's been really important because it means that the overwhelming majority of members can benefit from the website – not just those with home internet access. This is critical to meeting our objective in making the website our primary communication channel.'

■ Strong relationship with the website developers

The relationship established with the website designers HeadRed was very positive and a key factor in delivering the project to agreed timescales:

'HeadRed provided access to a project relationship manager but also direct access to the site developer. This meant we were able to talk through issues arising at a high level, for example, deadlines, testing procedures and design concepts but also resolve technical issues very quickly. This arrangement continues and on-going technical support is easily accessible.'

■ Setting clear objectives

Part of the success stems from having a very clear set of objectives, which enabled HeadRed to deliver a site that met the union's needs very quickly and with the minimum of re-design.

■ UMF requirements

The project requirements of the UMF were helpful in focusing on project delivery. Project management training offered in conjunction with the TUC developed new and valuable skills; and the need to develop a project plan with milestones and an evaluation strategy provided the necessary discipline to keep the project on track:

'Our participation in the UMF has delivered more than just a financial input. Union officers have benefited from the implementation of the project, acquiring new skills in project management, website development and interaction with other unions through the dissemination process.'

Challenges and learning

Tim adds:

- It is clear that just having a well designed website is not enough – although the visitor hits have exceeded expectations, they are still far from engaging all the membership.
- The features need to be relevant to members' needs so that they regularly return to the site to access information and see what's new.
- They need to be regularly reminded of the website and what it has to offer.
- Providing new and interesting material on the website is a challenge. Our union is small, with limited resources, so work on the site must be prioritised along with other activity. The success of the website has raised members' expectations and there is a danger that members will stop using the site if it is not updated on a regular basis.
- This challenge highlights the importance of the interactive features, particularly the forum, because it is the members

themselves who update this part of the site. It is clear that we will have to work hard to promote these facilities and generate more topics within the forum that members want to debate.

- Another challenge for the team responsible for updating the website is ensuring that the style and presentation of the site meets the new design brief. This is important because it would be easy for the website to become a hotchpotch of different styles, which could detract from the usability. So the system is updated using a content management system, which pre-determines the style and layout of pages – a useful feature in helping to keep presentation consistent.
- Although we plan to make the website our primary communication channel we intend to continue without traditional paper-based newsletter and magazine. Our members are very busy people and don't always have time to browse the net and some prefer reading a newsletter at home or during lunch break. The purpose to the website is to improve services to members not to disenfranchise some by taking away services they value – the challenge is to get this balance right.

'We are extremely pleased with what we have achieved over the past 12 months. But we are very aware that this is only a start. If we can harness the quality of feedback in greater quantity it will become a powerful source of information. We have come to realise that the development of the website was not just a 'nice to do' but essential to our purpose of protecting our members' interests. We are confident that we can demonstrate that the UMF grant represents good value for money in its aim to equip unions to contribute effectively in the modern workplace.'

For more information on the NGSU project, contact Tim Rose, NGSU General Secretary, on 01295 710767, or email trose@ngsu.org.uk

