

# UNION MODERNISATION FUND

**BERR**

Department for Business  
Enterprise & Regulatory Reform

**COMMUNITY AND DISTRICT NURSING  
ASSOCIATION – EMPOWERING  
MEMBERS IN A SMALL UNION**



# Community and District Nursing Association – empowering members in a small union

## Background

The Community and District Nursing Association (CDNA) is a very small trade union with just 4,000 members and very limited resources. Keen to align these resources with their organisational priorities, the union had already embarked on a modernisation programme that has three elements: identification of aims and objectives; a review of communications with members; and a review of internal organisation and staffing.

A key priority of the CDNA's modernisation agenda is the better use of resources and their alignment with the union's priorities. The union's UMF project sat firmly within their overall strategy by focusing on improving not only administrative efficiency but also two-way communications with members, taking the union's work forward to a level they would be unable to reach otherwise.

## Why this project

Union participation was lamentably low: the 2005 conference, for instance, was cancelled because of poor attendance; and fewer than 5 per cent of members took part in the NEC elections that year.

*'It is important to stress that the integration of the website and administration systems is not an end in itself. It is rather a means of enabling a very small organisation to make best use of its resources and develop an additional way of members communicating with their union, to involve our members and deliver a better service.'*

**Anne Duffy**  
CDNA Chief Executive

## Communications and organisation reviews

As part of the modernisation agenda, the CDNA's communications with members and its internal organisation were reviewed, involving consultation with members. Discussion groups in particular highlighted that some members were unaware of the website and no-one taking part in any of the discussions made regular use of it.

Feedback also showed that many of the benefits of union membership were not well known or understood by members. Although the website had recently been

upgraded as part of the modernisation strategy, it nevertheless remained a limited one-way communication tool and, although it was valuable in providing information, it didn't make full use of the most innovative technology and communications systems available. What's more, communication with members was still predominantly paper based. A key conclusion was that the CDNA needed to improve its communications and relationship with members. Furthermore, they needed to do that in a way that addresses the difficulties facing members because of their geographical distribution across the UK and their irregular working hours. They wanted to move from mass 'quantity' communication to individual 'quality' communication. Without UMF funding, though, these steps would have been impossible.

### Maximising UMF funding

The union decided to use UMF funding to harness the latest technological advances of the internet and bridge the distance between head office and member, enabling key union officers – employed and lay – to improve their communication and support each other better.

The main aims of the project were to:

- improve **two-way communications** between members and the CDNA;
- increase the level of **participation by members** in the union;
- improve the **union's response** to members' specific needs;
- align the CDNA's **limited resources** with the priorities of the organisation and the members.

This would enable the CDNA to reflect members' views on new NHS initiatives and engage in meaningful consultation with NHS employers at every level. Improved participation and better dissemination of information would also benefit employers

as well as members. CDNA Chief Executive Anne Duffy explains:

*'We wanted to take a holistic approach to the way we operate so that our relationship with members is dynamic and encourages and drives member participation in the union. In short, we wanted to add value from every activity we carry out.'*

Ultimately, the project would enable the CDNA to:

### Support individual members through:

- online access to legal advice and assistance;
- discussion forums and the facility for dialogue and problem solving online, member to member or officer to officer;
- regular online surgeries, both 'open' and themed, so that professional issues could be addressed with peers and experts – for example, 'Community Matrons', a recent structural change within the NHS that affects many CDNA members: members who are committed to making these changes work need the opportunity for support, which the union had hitherto been unable to provide in the individual way it would like
- regular online 'Agenda for Change' surgeries;
- communication tailored more accurately to members' needs and expressed interests;
- an individual welcome note, with local and regional information particular to individuals.

### Promote participation and union democracy by:

- creating a secure facility to enable the union to conduct ballots and votes online;

- enabling all members to take part in discussion about major changes in the NHS – for example, the Department of Health’s consultation on Commissioning a Patient-Led NHS: while the union tried to organise discussion groups on this around the country, geography and work constraints meant only a small number of members could take part; an online facility would mean members could participate and have their say at a time to suit them;
- using discussion forums and chat rooms to promote discussion of professional practice issues, such as Elder Abuse;
- providing regular online discussion with experts in the field to provide the professional support, development and capacity to share best practice.

### **Place administrative functions online and:**

- enable all union admin tasks to be undertaken online and remotely, with appropriate levels of access security built in;
- link in the membership database to enable membership to be accessed and administered remotely and provide a robust tracking system for matters relating to individual members;
- have the capacity to develop the qualitative information held on individual members to enable the union to target information and communicate opportunities more effectively;
- have the facility for online event management;
- provide a facility for lay officials to interrogate and maintain membership data to reduce delay and improve accuracy of data held;
- enable union officers and lay officials to communicate quickly and regularly with each other and with members;

- reduce the admin burden on lay officials and enable them to devote the free time they have to raising the profile of the union in the field and support members at local level, both individually and collectively.

Creating a ‘virtual’ union would not be to the detriment of members who would prefer to communicate using more traditional methods, since the union intends to ensure that no members are excluded by the new systems. Says Anne Duffy:

*‘Our members are spread across the whole of the UK and work in a variety of environments, rural to urban. They also work 24 hours a day, seven days a week, 52 weeks of the year. Our activist network was weak, with large groups of members in parts of the country unrepresented at local level. In several areas we were unable even to maintain a branch structure. Only the Director and the two national officers on the payroll are field staff - they can’t physically reach members in many areas. Members themselves have proved reluctant to come to meetings we have organised. We couldn’t cater to our members’ needs nor have good and effective communications with them without developing our IT systems – and if we couldn’t communicate effectively, we couldn’t hope to improve levels of participation.*

*‘There’s great opportunity for staff involvement in a whole raft of initiatives in the NHS. We needed to improve communications and participation to enable us to take advantage of this and represent our members more effectively. This will contribute to positive working relations at local level as our representative network grows and is better informed.’*

## Setting targets

Targets were set for each objective, which would result in a fully interactive website for CDNA members, with:

- improved member participation – website access was monitored before the launch and at six monthly intervals, with a target of 5 per cent growth year on year;
- increased member participation in the union's internal democracy via the website, with a target of a 10 per cent increase in participation in the next NEC elections;
- reduction in office admin costs by transferring admin and membership functions to the new system, with the aim of a 5 per cent decrease in admin costs in the first year following the establishment of the improved systems.

## Methodology

### Project team

The project team met monthly in London, with regular interim reports provided by the project manager. The team consisted of the Director (who acted as project manager), the Chair of the NEC and one Vice Chair (who are both unpaid, elected members) and a Project Co-ordinator, an experienced project manager, with a good understanding of the CDNA and trade unions in general, so up to speed from the start. Because of the serious under use of the site and the enormity of the task to turn it around, the process was put out to tender and a new provider appointed.

### Project structure

The project had four key elements:

- 1. Research and development of a detailed specification.**
- 2. Design, development and installation** – a technical stage of the process,

making paper-based ideas fully functional.

- 3. Staff and member training and development** so that new facilities could be optimised.
- 4. Operational launch, roll out to members and evaluation.**

### Research and development of a detailed specification

The initial phase of the project comprised:

- desk-based research and benchmarking;
- two discussion groups (one with lay officials and one with a range of union members to test and confirm results);
- preparation of a detailed spec by the project manager and the IT consultant;
- review and revision of the specification;
- confirmation of detailed the specification by key union officers and the IT consultant;
- tendering process and awarding of contracts by 31 July 2006.

### Design, development and installation

It was anticipated that the new system could require an investment in new equipment in the national office as well as for lay officers, so an infrastructure IT audit was carried out and equipment upgraded accordingly (funded internally rather than using UMF funding). A training programme was drafted and training events scheduled by 31 December 2006.

### Operational launch and evaluation

The new website was launched at Congress House in January 2007, with a presentation by the IT contractor and a speech by the Secretary of State for Health – an invaluable opportunity to raise the profile not just of the new improved service for members but

also of the union, celebrating success and sharing lessons learned.

## Benefits

### Developing a fully interactive website

The newly designed site is now up and running, with all the increased functionality, rolled out gradually to encourage more members to use the site and increase their visits. The website now includes:

- secure member login;
- an easy-to-use search facility;
- quick link banners and buttons for fast navigation;
- fast online application form for CDNA membership;
- personalised member profiles;
- CDNA staff profiles;
- news, with feedback facility;
- forthcoming events calendar;
- the latest campaigns;
- the Primary Nursing Care online journal;
- online surveys;
- CDNA blog;
- CDNA discussion forum;
- links to latest publications.

### Improving participation

Access to the site was monitored before the project, before the launch and at six-monthly intervals after that (set to continue). A great deal of attention was paid to the look and feel of the site and user friendliness, and there has already been a significant increase in member usage; individual usage will also be investigated in more detail.

### Increasing participation in internal democracy

The CDNA was advised at the outset of the project that regulations prohibit the use of the website to conduct official internal elections. However, the union is ready for when such a change occurs. Says Anne Duffy:

*'We are confident that improving usage and increasing participation in informal votes and surveys will increase the engagement of members overall, so that participation in official internal elections will improve.'*

Meanwhile, the union has been running surveys and polls on the website on at two-weekly intervals on average and participation levels are steadily increasing. For example, the union took up an invitation to involve its members in the Pay Review Body consultations:

*'We had hitherto been unable to consult with members, other than quarterly via our printed journal, because of the cost implications of additional mailings. Our online survey, though, ran for six weeks, with a very encouraging response rate of 8 per cent. This contrasts with a survey early on in the life of the new site, which attracted only 57 responses. The new website encourages responses because it is user friendly. It's easy for members both to respond and to submit their responses.'*

### Reducing office admin costs

The new systems have meant that the admin resource is used more efficiently. For example:

- The information the union holds on its members has been refreshed and email addresses are now held for 55 per cent of members.

- Much more information can now be shared with members, both directly and when it's relevant and needed.
- The website is also being used to promote branch activities, including meetings, which has in turn reduced head office and branch admin costs.
- The plan is to move from a quarterly printed journal mailed to all members to an online only version by the end of 2007, which will enable further significant savings.

Anne Duffy is enthusiastic about the impact of the project:

*'This project has the potential quite literally to transform the way we work, our effectiveness and the level of service we are able to provide our members. It is enabling us to respond to members quickly and effectively, enabling efficiencies in our admin systems and allowing our members to participate in their union in a new, accessible and, most importantly for them, relevant way. CDNA members want to access their trade union when and in a way that fits with their lives. They also want to receive support and information from us and participate in debates and consultative processes on professional issues. This project will enable us to deliver this and improve levels of participation whilst at the same time streamlining our admin systems to free up time which we can redirect to member services.'*

### Sustainability

The project was designed with sustainability in mind:

- Ongoing responsibility for maintaining the systems and keeping training up to date lies with the Director.
- The website is now maintained by the union's staff rather than consultants.
- The CDNA runs induction and refresher training on the new communications systems in its education programme for activists.
- Members' use of the new systems is monitored on a scheduled basis to ensure continued increase in access and participation.
- A programme of member briefings is being developed to ensure continued growth in website use.

### Lessons learned

The union met all its objectives for the project, with some useful lessons learned:

- The decision to appoint a new provider rather than source IT expertise for the project from the existing contractors meant that the end result, although of a high standard and meeting the criteria set out, of necessity cost more than initially anticipated. The CDNA were able to re-profile the budget, with the DTI/BERR's help and support; but unanticipated delays (although well managed) were caused as a result.

- As the project developed, the union discovered that their admin processes for storing members' financial information and managing the collection of membership subscriptions was not compatible with the new website. As a consequence, while the website has the functionality to fulfil this role, additional software is needed to manage it. As a small union on a very tight budget, this will need to wait until the next financial year. Anne feels that *'more thorough research before the project started might have avoided this.'*
- Because of delays, the union decided to complete the project in 10 months rather than the projected 15, spreading the costs over only two financial years rather than three. Anne says, *'Although we believe this to have been the right decision, it has not been without difficulty and we would advise other small unions to give serious attention to their financial planning.'*
- Staffing resources have not been fully covered by the project. Anne explains, *'To a degree we believe there is probably a certain inevitability about this, but changing the overall design of our site required additional writing and editing of content that had not been anticipated.'*

## Best practice identified

The project has been well matched to the profile and size of the union and elements of best practice could be replicated by other unions:

*'We believe that some of our lessons learned will be of value to other unions, particularly those of a similar size and profile. We are investigating the possibility of including a section for visitors to the website who are interested in the project to post questions and take part in online*

*discussions. We are also discussing with employers the possibility of their participation in online discussions on specific issues.'*

## Conclusions

The union is delighted with the end result, as Anne concludes:

*'We have developed a website that takes our union well into the 21st century. As a consequence of the project, the CDNA now has a vastly improved website – enhanced functionality, a much better look and feel, and a site much improved in terms of its usability and user friendliness – essential ingredients of a successful website. At the outset of the project in April 2006, the daily 'hits' to the site varied between 50 and 137. There was no way of knowing how many of these were members or people external to the union, but the conclusion was that even if they were all members, the best day of 137 out of around 4000 members was very unsatisfactory. Five months after the launch of the new site, the story was very different. There had been a consistent increase in usage as defined by 'unique' visitors per month (defined as when a visitor opens up more than one page and takes no longer than 30 minutes between individual pages). The trend of daily visits also showed a steady and consistent increase. What we would say is that without the impetus and support of the UMF and the DTI/BERR, we would never have been able to embark on such a project.'*

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