

# UNION MODERNISATION FUND

**BERR**

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**TRADES UNION CONGRESS –  
DEVELOPING AN ONLINE SUPPORT  
SYSTEM FOR UNION PROFESSIONALS**



# Trades Union Congress – developing an online support system for union professionals

## Background

The TUC holds a unique position in the global trade union movement, with the existing networks to deliver continuing professional development to those who work for trade unions – ‘union professionals’ – in the UK. (Union professionals are all those directly employed by unions – negotiating officers, organisers, policy officers, as well as administrative and support staff.) Their UMF project sits within the overall context of improving TUC communications.

## Why this project?

The principal drivers for the UMF project were the need to communicate directly with union professionals and to provide a secure space in which they could communicate among themselves. The TUC produces briefings on policy issues, campaigns, notices of events, as well as details of training and development programmes to its affiliates and, in the digital era, it made sense to create a single hub for the dissemination of TUC materials and those produced by the various union networks such as legal officers, environmental officers, and so on. Such a hub would allow greater participation and consultation for all union professionals. What is more, TUC strategic priorities – campaigning on pensions, equality and employment rights and providing education and support services to unions – rely on effective two-way communication with union professionals.

Union professionals are a geographically diffuse constituency and it was clear that the best way of communicating with this particular community would be through a website. The aim was for the union **professionals** online community to appeal to people who work in each and all of the various union roles. The only requirement for membership of this online community was that an applicant must be directly employed by a UK trade union. The name of the website was chosen to reflect this: [www.unionprofessionals.org.uk](http://www.unionprofessionals.org.uk). Alongside the website, it was clear that having a database of union professionals, linked to the website, would be an invaluable asset. Over the years, the TUC has developed various email based networks arising as a result of its policy, campaigning and lobbying activities. Many of these had been created on an ad hoc basis by individuals or TUC departments. This project offered an excellent opportunity to harmonise those lists to compile a single, definitive and up-to-date database that could be managed and maintained as efficiently as possible.

## Identifying contractors

The project was heavily dependent on identifying the right partners to deliver the website and email facilities and these were the subject of intense planning and discussions. Ultimately, the TUC opted for the Big Oxford Computer Company (BOCC) to design and build the website, having met with them several times to discuss

ambitions for the project. Moreover, BOCC's commitment to guarantee their work in the early days of the project provided additional confidence of success.

Tenders were sent to three email system providers and each of them interviewed. Representatives from BOCC took part in the interview process to advise on technical issues. The TUC was aware of the consequences of choosing a supplier whose system was incompatible with the website structure, which is why it was keen to involve BOCC. From the three bidders, Email Reaction (now Smart Focus Digital) was chosen as the email marketing system provider. Their support and training package was the most comprehensive.

## Methodology

A number of factors informed the development plan for the website:

- Responding to union professionals' needs for an interactive space which would also be a central repository of key information and resources to support their work
- Facilitating exchange of information amongst union professionals with a range of discussion forums and interactive website features
- Providing a one-stop resource for union professionals' continuing professional development courses, seminars and related resources
- Enabling the TUC to provide targeted communications to union professionals
- Creating the capacity to provide up-to-the minute information and updated materials quickly and economically
- Maintaining a live online database of users and their profiles, regularly updated, to improve targeted delivery of TUC services to union professionals
- Providing survey/poll functionality to collect data to inform the development of TUC services and respond to union professionals particular needs and requirements

The project was approached in two stages, addressing all the TUC's priorities in improving communication with union professionals and ensuring that the TUC's services and products are as relevant and useful as possible to union professionals:

**Stage One:** Creating an online community for union professionals, hosting resources and materials essential to the work of people who work for unions, together with information on training and professional development, including training courses.

Websites and resources already existed for many other groups in the trade union family, including workplace representatives and trade union tutors, and these have been very successful. However, partly in response to recommendations in a 2005 report by the Open Learning Partnership (OLP) on the provision of training for trade union professional officers, the TUC recognised that there was great need for a facility for people who work for unions to be able to access and exchange information about their work and responsibilities in a secure environment.

**Stage Two:** Building a database of TUC union professional contacts using an email marketing system that is updated regularly, creating a single, well-managed database for TUC union professional contacts, which would link to the website. It would also allow contact information to be organised in a more specific way.

It is hoped that this will help to overcome some previous difficulties, such as inconsistencies between unions in terminology or ambiguity in job titles, as members can list their interests and responsibilities rather than being placed

within pre-defined categories. In turn, this should allow TUC policy officers to identify a wider group of people with an interest in their policy area than has previously been possible. This should further improve the quality of information and materials on the website as members can contribute more easily than before – for example, by generating case studies and providing anecdotal evidence.

Presentations were made to staff in each of the TUC departments and many of the regional offices on the project, its aims and potential, throughout 2007 and contact lists from each department were collated and included in the database.

## How it works

### The online community

- The TUC regularly produces a wealth of research and policy papers on a vast array of matters of interest to union professionals and the union **professionals** website now provides a one-stop shop for such materials together with information about training courses, seminars and all other professional development related products and services provided by the TUC or other organisations, such as the Work Foundation, Involvement and Participation Association (IPA) and the Labour Research Department (LRD).
- TUC Education courses, now offered through unionlearn, have demonstrated that there is a huge benefit to union **professionals** when they have the opportunity to problem-solve with other people in similar jobs in other unions. The unionprofessionals website now replicates this facility online using discussion boards, thereby making such opportunities more accessible and frequent. The website also contains a membership directory that all members may access, although individual members may opt out of it if they so wish.
- Unlike other TUC websites, the union **professionals** website is interactive, allowing members to post comments, information, articles, events, links and resources that they want to share with other union professionals. The website is structured by theme areas, such as Health and Safety, Employment Law and Research or Equality. Within each theme area there are several sub-themes, and the website itself now has over 100 pages covering the full spectrum of union work. Each area hosts articles and resources related to that topic, together with links to further materials.
- Union professionals must register with the website in order to be able to access materials and contribute to discussions. At this stage their eligibility for membership is checked to ensure that they are directly employed by a trade union and a unique username and password is issued to them. When using the website, they are deemed to be representing their union as they would be in any other public forum. Although members can choose not to display any information in the members directory, anything they post on the website is attributed to them.
- While the stated aim is for the website to be as inclusive as possible, there is also the facility to offer specialist areas on the site, accessible only to a defined group. For example, currently there are closed areas for National Union Education Officers, Black Officers, Gender & Women's Equality Officers, Pensions Specialists, Union Publishers, and European Officers. There is great potential for other groups of union staff, such as personnel and finance officers to have forums of their own, where they can hold discussions and share information and experiences in their specific professional area.

- The website also provides the capacity to rationalise the TUC's distribution lists centrally, making it easier to ensure that data have been collected in accordance with the Data Protection Act (1998) as well as being more efficient and cost-effective. The database can be interrogated in a variety of ways to target specific groups of union professionals.

### The database

- The email marketing system uses the database to send regular newsletters to website members and potential members, generating interest in the site and its features. It can also be used to alert members to new discussions or policy papers in areas where they have expressed an interest as well as promoting events. It has already proved "remarkably successful" in targeting officers who live and work in specific areas to increase subscription rates of courses provided through the Union Professional Development Programme.
- The technology the email marketing system uses allows the TUC to assess the effectiveness of its marketing as it records interest in articles and announcements. This means that the TUC can evaluate interest and demand for its services and products in a way that was previously not possible. This type of system is used by other major third sector organisations such as public service broadcasters, political parties and charities and offers the TUC exciting new ways to enhance and improve the services it offers to Britain's trade unions.

## Outcomes

Recruitment to the website continues to grow, and activity within the site is expected to reflect that growth:

- 1,080 members have registered from 50 TUC-affiliated unions, all the TUC regions and across all areas of union work and visits to the website average 60 per week.
- A database of more than 2,000 union **professionals** has been developed, including information on more than 40 fields, offering exceptional capacity for interrogation.
- Seven interactive e-newsletters have been developed and sent to all members of the union professionals database.
- Dozens of targeted e-alerts have resulted in increased course subscription.
- More than 10 promotional and feedback-generating presentations have been done to cross-union officer networks.
- More than 8,000 union **professionals** brochures have been distributed to union offices all across the country.
- One round of post-launch enhancements has been completed based on user feedback.
- The union **professionals** website has been promoted at dozens of TUC events.
- User guidance has been developed and piloted.
- 27 discussion forums with about 40 topics are up and running, and each topic area of the website has at least one dedicated forum – these offer a suitable place to discuss strategies and share best practice among fellow union professionals.

- The website links to other websites and resources relevant to the work and professional development of union professionals.
- A highly successful training needs survey was undertaken, using the website technology to circulate the questionnaire and collate the 544 responses from union professionals from 37 different unions – a far higher response rate than a comparable survey in 2005, demonstrating the effectiveness of this approach.
- Union Professional courses are attracting sufficient numbers to run in areas where recruitment has been insufficient in the past – for example, more than 20 applicants for a course in Leeds.
- There have been increases in course recruitment – an Employment Law course has had to be repeated and a third may be necessary in London due to over subscription.
- The TUC has been able to collect and compile views and opinions of union professionals on TUC services and products through surveys and opinion polls.
- A comprehensive and manageable database of TUC union professional contacts has been created.
- Monthly email newsletters have a successful delivery rate of 98 per cent.

## Sustainability

Sustainability is necessarily a key issue in any UMF project, and not least in this one. The TUC's Senior Management Team recognised the importance of the union **professionals** site and when the development phase ended in December 2007, management of the site was assumed by the Information Service. In addition:

- the email system is being developed for use by TUC departments and regional offices for their own initiatives and staff training in using the email software is being undertaken in a systematic manner, providing further scope to improve communications with unions. This will also position the website and database firmly within core TUC activities;
- the TUC also established an editorial board, which meets monthly. It is chaired by the Deputy General Secretary and consists of representatives of each of the TUC departments. The board will ensure that the website continues to provide all the materials and resources that union professionals need to do their jobs effectively and that it is positioned at the heart of the TUC's work, helping to strengthen and enhance communications with union professionals. A key priority of this board is to establish relationships with other bodies or organisations who can provide resources of value to union professionals. Initial interest has been shown by several organisations and further discussions with their representatives are taking place. The Editorial Board has scheduled meetings well into 2009 to continue the management of the content and promotion of the site.

## Lessons learned

While the project benefited from a very clear understanding of its aims and objectives and these were strongly reinforced throughout the project period, there are some important lessons to learn for future projects, principally:

- **Allow more time in the project planning stage to clarify IT specifications**

There were numerous examples of instances where a seemingly simple aspiration for the functionality of the website led to a long series of unforeseen problems, where absolute clarity was necessary to proceed. This led to considerable periods of time spent solving queries that had not been anticipated. The TUC was fortunate to be working with website developers who had worked with the organisation before and therefore had some understanding of what the TUC was trying to achieve. Although this did not significantly delay the project it would have been helpful to have had more time to work these through.

- **Do not overwhelm users**

e-bulletins have proved to be popular, but their frequency has now been reduced from the original intention of weekly publications to monthly – a decision driven by practical experience that the arrival of a weekly e-bulletin would be likely to overwhelm the target audience, simply in terms of volume of email.

## Best practice

The project went well. Some of the strengths of the project include:

- **Setting clear goals**

The project was based on a sound understanding of the nature of the challenge that faced the TUC in communicating with union professionals and the opportunities for overcoming these that the UMF project could offer. Almost all aspects of work around the development of the project were considered in the context of achieving these goals.

- **Ensuring good team ethos**

The project team quickly established a good team ethos. This was enhanced by the complementary areas of knowledge and experience that team members brought to the project. They were also able to rely on advice and support from senior managers within the TUC on an informal as well as formal basis.

- **Raising awareness**

The emphasis on promoting the website and its potential to all TUC departments proved to be rewarding to the project as other staff were able to contribute ideas and advice readily as they were aware of its existence.

## Looking forward

- The aim is ambitious for the union **professionals** website to continue to grow to host more resources and help with career development for this key group of union personnel. The TUC is currently developing podcasts for union professionals as a new way of offering information, allowing them to download and listen to material of interest to them at a time convenient to them. They also hope to investigate the possibilities of video presentations hosted by the union **professionals** website in the future.
- Specific areas within the website will be developed to host discussion forums for groups working on a specific project, such as the ILM management qualification for union managers. Much of the content of the rest of the website is appropriate for this group working on this project and it is expected that further such groups will develop their own discussion groups.
- The area that proved to be the most time consuming was the collation and management of the profile data of members. Action is now underway to encourage more members to provide more information about themselves and their work and to make that available to other members through the membership directory.

## Conclusion

The project has been highly successful and has established the union **professionals** website as a key resource for union staff. A significant part of its value to this key group is that the website can adapt to meet the needs of union professionals into the future. Although the work of union professionals may change, resources, advice on best practice and access to training and development opportunities will always be available within the website.

The continuing increase in recruitment to the website demonstrates that it is meeting demand and this will be maintained and increased further as new products and services become available.

The project has contributed to transforming the TUC's communications with union professionals both in terms of managing contact data and distributing and collecting information. The website and email system offer much more effective ways of monitoring interest in and demand for TUC products and services ensuring that these are up-to-date and easily available.

Quotes from union professionals members:

*"I am very impressed with the union **professionals** website – great resource with lots of potential."*

*"Union **professionals** keeps me up to date with best practice in the Equality field. It's information that would take hours to find any other way."*

*"The union **professionals** website is a great tool that will allow trade unions to network very effectively."*





