



Department  
for Business  
Innovation & Skills

**EMPLOYMENT RELATIONS  
RESEARCH SERIES**

**UNION MODERNISATION FUND**

Round Three evaluation –  
Broadening the role and value of  
unions for an increasingly vulnerable  
workforce

**FEBRUARY 2014**

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# EXECUTIVE SUMMARY

## Background

Unions in the United Kingdom and Northern Ireland have come a long way since the increasing interest in equality in the 1970s. There have been a range of policy related and strategic developments in relation to gender and race, for example. There are challenges which remain but unions have reformulated much of their ways of working to account for the social needs and characteristics of their members and the workforce in general. The role of UMF 1, 2, and 3 has been important in crystallising this development and in creating a space of building the internal organisational changes needed to sustain it and make it more relevant.

UMF3 was distinctive and, in many respects, more challenging in its emphasis on harder to reach workers. While vulnerability had been a topic of consideration within the union movement for a number of years prior to the launch of UMF3, the activities of UMF3 projects challenged unions in ways not experienced in the first two rounds. This related notably to understanding, and to some extent accepting, the nature of vulnerability within unions, working out within unions how they could best engage with such workers and reaching out to a wider range of relevant voluntary and community bodies associated with vulnerable workers and issues.

## Aims and objectives

The aim of this project was to evaluate the processes and outcomes of the 3<sup>rd</sup> wave of the Union Modernisation Fund. It involved interviews with all participating projects and a detailed study of their reports and activities. The broader aim was to evaluate the extent to which the projects were embedding new ways of working and new sensitivities with regards to those workers who were vulnerable within the workforce.

## Headline findings

The first objective of the evaluation was to explore the success of individual projects in relation to both their specified aims and objectives and the overall aims and objectives of the UMF. The evidence here was relatively straightforward. All projects completed, with only a couple requiring small extensions. Many unions mentioned how their internal structures had developed in relation to equality departments, equality and vulnerable worker representatives, ongoing reflection on what vulnerable workers were and needed through new research agendas, the use of new techniques for union work such as mentoring and leadership training for specific groups and engagement with new ways of liaising with social groups and establishing innovative structures such as employment agencies and information. This had a concrete effect on many groups in terms of different dimensions of activity, including:

- Awareness of employment rights amongst a range of groups
- Focused and useful labour market information for specific occupational groups such as journalists and entertainment workers
- Toolkits for dealing with disabilities and broader issues of vulnerability
- Formal and informal union representatives armed with a greater awareness of the complex nature of vulnerabilities when dealing with smaller and dispersed workplaces
- Links with community groups involved with vulnerable workers that can raise employment rights issues and more co-ordinated project activities
- Closer co-operation with enforcement agencies and public bodies around the enforcement of legal rights on targeted groups
- Social media and more extensive communication beyond traditional 'paper based' approaches

The second objective was to evaluate the nature and extent of the direct benefits accrued, lessons learnt, and good practice lessons arising from individual projects. Certainly, when transformational potential was judged against benefits, lessons and good practice UMF3 projects appeared to be successful. There were wide ranging benefits and key lessons learnt.

The third objective was to consider the extent to which projects successfully handled difficult challenges or unanticipated obstacles. To some extent the challenges faced by projects in UMF3 were more significant than in previous UMF rounds, but they impacted less on projects. A key challenge of earlier rounds related to the implementation of new technological systems, which often had the potential to significantly delay projects. This was less of an issue for UMF3. In this case the main challenges related to understanding vulnerability and reaching out and working with third sector organisations. All projects were able to meet or work around such challenges and deliver productively in one way or another.

The fourth objective was to evaluate the extent to which UMF3 projects have enabled unions to embed longer-term cultural and behavioural change. As noted, no definitive conclusion can be made on the longer-term impact of UMF3 projects. Only time will tell in this regard. However, there are some solid grounds for optimism. First, the research and engagement activity of projects had significantly enhanced understanding within and acceptance by different levels within unions of the need to support vulnerable workers. In most cases, this was not just seen as research undertaken or training designed that finished with the projects. Second, as part of UMF3 many unions were starting to see the value in reaching out to external groups and voluntary and community organisation to forge new ways of working and to identify new opportunities for joint working. The Union Modernisation Fund represented one of the most intense and extensive moment of conscious, deliberate and coordinated form of innovation in the modern history of the British trade union movement.

The three phases of the UMF steadily led to a wide range of projects related to a diverse set of demands and pressures on unions in a changing economic and social context. In many cases unions managed to engage a whole new set of workers, further opened their decision making processes and provided a range of internal organisational spaces for innovation and modernisation to progress.

The UMF also created a new dialogue on matters of change and it established new networks and new forms of understanding. Unions such as UCATT, the BFAWU, the GMB, and others used this opportunity to cement progress into a new type of open and relevant unionism.

The need to maintain interest, create spaces for accessing learning materials and sustaining dialogue around inclusion in society will not come to an end with the funding of the UMF. The outputs and outcomes of the UMF agenda are or relevance beyond the trade union movement.

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# 1. INTRODUCTION

## 1.1 Overview of the Union Modernisation Fund

The Union Modernisation Fund (UMF) was established under the auspices of the Employment Relations Act 2004, which inserted into the Trade Union and Labour Relations (Consolidation) Act 1992 an authority for the Secretary of Trade to establish a Fund to facilitate the operational modernisation of independent trade unions and their federations. The UMF was set against the changing contextual environment that trade unions in Britain currently face. This not only means a declining membership base, but a more diverse set of representational interests, technological challenges and a more complex political and managerial context (see Stuart et al, 2009). Against this backdrop, the purpose of the UMF was to support innovative projects to help speed unions' adaptation to changing labour market conditions. It aimed to support projects that either explored the potential for, or contributed to, a *transformational* change in the organisational efficiency or effectiveness of a trade union or unions. Through helping unions to explore and test innovative ways of working, and by disseminating the results of projects widely across the union movement, the Fund also aimed to provide a *demonstration effect* to the broader trade union movement, enabling unions to realise more fully their potential to improve the world of work for workers and employers alike (see DTI, 2004, 2005a).

The rationale for the UMF was clearly detailed in the Regulatory Impact Assessment published in 2005 by the then Department for Trade and Industry (DTI, 2005b). The backdrop to union modernisation was the changing world of work, which had seen rapid developments in new ICT technologies, more flexible patterns of work and changing diversity in the labour market, most notably in terms of female participation but also more recently in terms of an increasing presence of black and minority ethnic groups and migrant labour. This suggests two big challenges for unions. First, in the face of increased competition, 'the best employers now use a wider range of managerial initiatives to engage their workers' (DTI, 2005b:2). To respond to this, unions need to better understand the changes that are taking place in the world of work so they can 'work with employers to maximise the potential benefits of new ways of working' (DTI, 2005b: 2). Second, and related, while unions have been taking the initiative to modernise themselves, the pace of change has been quite slow and unions face a number of obstacles in their ability to change. Competition between a large number of unions means that subscriptions are low, while most unions only employ a small number of people and their management systems are relatively unsophisticated. This means that unions 'have a limited capacity to invest for the longer term and to take financial risks associated with innovation (DTI, 2005b: 2). Nonetheless, unionised workplaces are known to be associated with 'more progressive workplace policies towards training, health and safety and diversity' (DTI, 2005b:2). 'By supporting a forward-looking agenda for unions, the UMF should therefore enable unions to realise more fully their potential to improve the world of work for all concerned' (DTI, 2005b:2).

The first round of projects started in 2006 (with the Round launched in 2005) and focused across 6 thematic priorities. In total, 35 projects were funded under UMF1 and an evaluation report was published in 2009 (Stuart et al, 2009). UMF2 was launched in November 2006, with projects started in 2007. It followed the same basic thematic priorities as UMF1, with an additional focus on the training and capacity building of equality representatives. In total, 31 projects were funded under UMF2 and an evaluation report was published in 2010 (Stuart et al, 2010). The third and final round of the UMF was launched in 2009, with all projects due for completion by early 2012.

The focus of UMF3 was distinct from the previous two rounds and invited projects specifically around the theme of vulnerability at work. Proposals were invited for projects against five priority sub themes:

*Theme 1: Improving the ability of unions to respond to the needs of vulnerable workers by the development of grassroots networks and outreach models; working with a range of voluntary and community organisations to develop appropriate supports and advice mechanisms*

*Theme 2: Development of new services aimed at vulnerable workers (and those likely to enter vulnerable employment), including: the provision of information services and training to raise awareness of employment rights and enforcement mechanisms; and the development of skills and training packages designed to meet the needs of vulnerable workers*

*Theme 3: Development of the professional competence of union officers and representatives, particularly equality representatives, to meet the specific needs of vulnerable workers and encourage greater participation of members in the union*

*Theme 4: Creation of leadership development and mentoring services for vulnerable workers*

*Theme 5: Development of new models for working with employment agencies, enforcement bodies and other organisations to promote the interests of vulnerable workers*

In practice, as in previous rounds, most projects were organised across a variety of the priority themes.

This short report brings to a conclusion the extensive evaluation of the UMF that the authors have, together and previously with other colleagues, presented (See Stuart et al, 2009, 2010). These evaluations have served to provide an insight into the innovations and challenges of modernisation as kick started by the UMF. They have served as an attempt to ensure that lessons are learnt for any ongoing project of modernisation within the British trade union movement, by collating cases, presenting recommendations and outlining shortcomings. In an age when organisational memories fade or cannot cope with the extent and complexity of change, the evaluations serve as a key point of reference to make the UMF accessible within trade unions and beyond.



## 1.2 Funded third round projects

In total, 13 projects were funded under UMF3. The projects are detailed in Table 1, including the grant offer made to each union. Funding was allocated to unions of a range of sizes, including the two peak union bodies, the Trades Union Congress (TUC) and the General Federation of Trade Unions (GFTU). In total £2.083 million was dispersed across UMF3, with just over £7.2 allocated across the three rounds of the UMF – well within the original estimate of distributing between £5-10 million through the Fund. Grants were awarded up to the maximum of £300,000 with trade unions expected to provide at least 50 per cent of the project costs. The smallest grant was awarded to the TSSA for a specialised project on tackling dyslexia and the largest to the TUC for a complex, multi-dimensional project that had a coordination element attached to it. In general, the average award to projects under UMF3 was higher than in previous rounds. Just one union, BECTU, was awarded multiple grants in UMF3. All unions that participated in UMF3 had been awarded funding under previous rounds of the UMF. Short summaries of each project are detailed in Annex A.

Table 2: *Projects by union funded under UMF3*

Union	Project title	Grant offer	Size of union (000)
Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU)	Challenging the creative labour market: moving young workers to centre stage	£252, 595.50	20-49
Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU)	Co-operative agencies for entertainment industries freelancers	£66, 000	20-49
Bakers, Food and Allied Workers (BFAWU)	Reaching Out	£61, 479	20-49
Community	Beyond the workplace: community in the community	£130, 690	20-49
General Federation of Trade Unions (GFTU)	What to expect when you start work	£137, 953	N/A – Peak body
GMB	Engaging communities and building social capital	£152, 157	500-999
National Union of Journalists (NUJ)	New Networks	£187, 208	20-49
Rail, Maritime Transport Union	New website and training for vulnerable workers	£81, 638.50	50-99
Trades Union Congress (TUC)	Supporting unions to tackle vulnerable employment	£271, 539.97	N/A – Peak body
Transport salaried Staffs' Association (TSSA)	Tackling Dyslexia discrimination in the workplace	£29, 187	20-49
Union of Construction, Allied and Technical Trades (UCATT)	Building a stronger union: protecting vulnerable workers	£197, 336	100-499
Union of shop, Distributive and Allied Workers	Engaging vulnerable workers	£264, 600	100-499
Unison	Hidden workplace	£251, 602	>1 million
TOTAL		£2,083,985.97	

### **1.3 Aims and objectives of the evaluation**

The evaluation was commissioned in late 2011. This was deemed appropriate timing, as all UMF3 projects had completed or were close to completion. It was recognised, however, that even where projects had formally completed in terms of activities, in some cases final reports and evaluations were still forthcoming. It would also only be possible to evaluate the direct activities and outputs of project rather than longer term outcomes (see Stuart et al, 2009). Against this backdrop, BIS sought a summary evaluation of the overall success of UMF3, in terms of identifiable outputs and outcomes that had been achieved. The specific objectives were to evaluate:

- the success of individual projects in relation to both their specified aims and objectives and the overall aims and objectives of the UMF
- the nature and extent of the direct benefits accrued, lessons learnt, and good practice lessons arising from individual projects
- the extent to which projects successfully handled difficult challenges or unanticipated obstacles
- the extent to which unions have successfully used the third round to engage with vulnerable workers, take the union in new directions and develop innovative ways of working
- the extent to which UMF3 projects have enabled unions to embed longer-term cultural and behavioural change
- the extent to which it is possible to identify a long-term trajectory for change emerging across all three rounds

### **1.4 The methods of evaluation**

The evaluation drew on three specific sources of data. First, all projects conducted their own self evaluation, overseen by BIS. This involved a self-completion questionnaire sent to project managers and covered: key achievements to date; challenges; key learning points; obstacles to meeting final project objectives; other evaluation activity; continuity of roles. This self-evaluation was useful to unions in the way they were able to reflect on the project outcomes and the manner in which these were arrived at. Such approaches to evaluation allow a moment of internal reflection and organisational learning. Second, all projects had to complete end-of-term final reports. This was also of use to the union officers in gaining information and working through the different dimensions and activities of the projects in relation to outcomes. Third, semi-structured telephone interviews were conducted with all thirteen project managers. The interviews lasted between 35 and 70 minutes and in the majority of cases (ten) were tape-recorded and fully transcribed. The aim of the interviews was to probe more extensively into the material reported in the self-evaluations and final reports (not of all of which had been completed for use in the evaluation), most specifically around the challenges faced by the projects and the extent to which UMF activity was contributing to wider and deeper organisational and behavioural change within participating unions. Through these means the evaluators had access to multiple sources of data for each project. In addition to this,

understanding was enhanced through attendance at a number of UMF dissemination events and discussions with BIS officials.

## **1.5 Structure of report**

The report is structured into four further sections. Section two details the activities and outputs of UMF3 projects and considers how such projects understood vulnerability. Section three explores some of the key challenges faced by projects and how this shaped the ability of projects to deliver on their objectives. Section four looks beyond how projects responded to such challenges to tease out cases of transformations and change across UMF3 and how this may contribute to the longer-term sustainability of project activity. Section five draws some conclusions on UMF3 and briefly considers this against activity across the three rounds of the UMF. Summaries of all projects are provided in Annex A.

## **2. PROJECT ACTIVITIES AND OUTPUTS: INFORMING, SUPPORTING AND CREATING NETWORKS**

### **2.1 UMF 3 and the focus on vulnerability**

The third round of the UMF was distinctive in its focus on vulnerable workers. This issue, which had become increasingly significant in political and policy terms, was seen as having the potential to bring together many of the modernising agendas and practices of trade unions. The focus of UMF projects evolved over successive rounds. UMF1 and UMF2 included a broad range of themes, such as communications, internal management processes and working with employers, but consideration was also given to how unions could represent the interests of an increasingly diverse workforce. This emphasis on diversity was strengthened still further in UMF2 with a specialised focus on the role and contribution of equality representatives. Thus, diversity in labour markets was a thread running through the UMF, which became consolidated in UMF3 with the prime focus on vulnerability at work and in the labour market.

The need to address the question of the vulnerable workforce was seen as a serious challenge, given contemporary developments in the economy and labour market. The topic had been elevated as a matter of concern for trade unions in the TUC Commission on Vulnerable Employment (COVE, TUC) in 2007. This Commission estimated that as many as 2 million British workers could be classified as vulnerable, with the majority not represented by trade unions. Vulnerable work was seen as 'insecure and low paid, placing workers at high risk of employment rights abuse...vulnerable employment also places workers at greater risk of experiencing problems and mistreatment at work' (TUC, 2007: 12).

For the UMF3 call, the definition of vulnerability used by BIS was:

'Someone working in an environment where the risk of being denied employment rights is high and who does not have the capacity or means to protect themselves from that abuse. Both factors need to be present. A worker may be susceptible to vulnerability, but that is only significant if an employer exploits that vulnerability.' (DTI, 2006: 25)

**Table 2: Vulnerable workers targeted**

<b>Union</b>	<b>Project title/ type of vulnerable workers</b>
Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU)	Challenging the creative labour market: moving young workers to centre stage  Younger creative workers
Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU)	Co-operative agencies for entertainment industries freelancers  Individual freelancing workers
Bakers, Food and Allied Workers (BFAWU)	Reaching Out  Individual workers in small outlets
Community	Beyond the workplace: community in the community  Community groups and redundant workers
General Federation of Trade Unions (GFTU)	What to expect when you start work  Workers in less organised/regulated sectors
GMB	Engaging communities and building social capital  Marginalised communities and citizens
National Union of Journalists (NUJ)	New Networks: giving journalism's vulnerable workers the support they need  New workers and students for example
Rail, Maritime Transport Union	New website and training for vulnerable workers  Workers in transport sector employed through agencies or outsourcing
Trades Union Congress (TUC)	Supporting unions to tackle vulnerable employment  A broad range of workers through the UMF projects
Transport salaried Staffs' Association (TSSA)	Tackling Dyslexia discrimination in the workplace  Workers with specific disabilities such as dyslexia
Union of Construction, Allied and Technical Trades (UCATT)	Building a stronger union: protecting vulnerable workers  Unorganised and marginalised construction workers
Union of shop, Distributive and Allied Workers	Engaging vulnerable workers  Workers beyond traditional scope of union influence
Unison	Hidden workplace  Workers in outsourced positions

It is clear that such definitions did not drive the activities of projects per se. As one union (Unison) noted in their final report, there was little value in assessing what vulnerability meant, as the aim was to support and engage those that were subject to vulnerability in their employment. It was also clear that even those unions that may have had preconceived ideas of who was vulnerable and what vulnerability meant

were taken aback by some of the findings and work of projects. A number of projects conducted research and needs assessments as a first stage. This often identified groups of workers that may not have been thought of as vulnerable and, certainly, employment practices that shocked even hardened union activists. Most of the unions acknowledged that they were not prepared for the scale of vulnerability and nor were they well placed to support such workers. The journey that unions took to understand the needs of vulnerable workers and the means developed to engage such workers was the key finding and success of UMF3.

Against this backdrop, there was no single category of vulnerable worker identified across the projects. Many projects worked to engage migrant workers and those from Black and Minority Ethnic (BME) groups, but the overall net was cast very wide. Projects also sought to engage with young workers and new entrants, freelancers, retail workers, agency workers, disabled workers, dyslexic workers and those working for outsourced organisations. The way in which vulnerability was expressed went well beyond low pay and casual work and included no pay, redundancy and insecurity, bullying and violence at work, dependency etc. The point can be illustrated with a few examples. Both projects by BECTU focused on the vulnerabilities created by the specificities of the creative industry labour market. This includes a large number of freelance workers that find work through signing up to specialised employment agencies. These agencies charge upfront 'book fees' regardless of whether they find any work for the freelancers. Furthermore, there is a culture, often accepted by workers themselves, within the industry of new entrants working for no pay. For the BFAWU the focus was on the retail bakery sector, a part of the industry organised around small shops with very low or no union representation and very little dialogue between employees and management. In the case of the RMT the projects sought to uncover and tackle poor employment conditions in the complicated and fragmented employment arrangements that had resulted due to outsourcing within the rail sector. This included some shocking examples of employment abuse and violence on trains and in retail outlets at rail stations.

Different contexts and conditions of employment thus shaped initial perceptions of the meaning of vulnerability for UMF3 projects and acted as the main drivers for the projects. Equally important was the recognition in most cases that prior to the projects, the unions had either not adequately identified and understood the extent and nature of vulnerability nor were they adequately equipped to represent the interests of vulnerable workers. In other words, before the start of projects unions quite simply did not have the systems and structures in place to provide adequate support to assist vulnerable groups. One of the key successes of UMF3 was to improve understanding not only of the nature of vulnerability amongst unions, but just what unions would need to do, structurally and administratively to engage, organise and support such groups. It was also the case that over the course of projects, many unions changed their perspectives on just what was the identity of a vulnerable person.

## 2.2 Project activities and outputs

As in previous rounds, the activities of projects were wide ranging. As noted, the objectives were mainly directed at gearing the trade union movement up for working with a more diversified, centralised and vulnerable workforce. All projects completed against their objectives, with only two of the 13 projects requesting small extensions. The final project was officially due for completion at the end of May 2012. Judged in terms of activities against plan, projects were successful. Likewise, the outputs, with some minor variations, were as anticipated. The longer term outcomes of projects – that is the longer term impact that outputs will have within individual unions in terms of cultures and working practices – can only be judged in some years' time. However, the accumulated evidence across the three rounds of the UMF is that the funding has made a difference, not least in terms of the need for unions to engage with modernisation and the processes and challenges that this can raise for unions. As the previous section noted, the projects opened up unions to the meaning and nature of vulnerable employment and this resulted in some outputs across UMF3 that may well have a lasting effect. We shall return to this point.

The activities and outputs of each project are detailed in Table 2, with a short summary of each project presented in Annex A. To some extent both the activities and outputs of projects were similar to those of previous rounds. UMF3 fostered an extensive programme of background research, internal programme of training, wide-ranging dissemination and the upgrading of union technical capacity. The obvious outputs, as in previous rounds, were enhanced internal competence within unions, resource guides for best practice and new union websites. Nonetheless, there was also evidence in UMF3 of a higher degree of innovative practice, with unions challenged to extend their traditional comfort zones.

While it is difficult to categorise the way in which unions sought to modernise practice through such types of innovation, four broad areas are worth considering.

Firstly, UMF3 projects had a much more extensive emphasis than previous rounds on **outreach**. The emphasis on vulnerable workers not only focused unions' sights on specific groups of disadvantaged workers, but workers that unions had often not previously organised or represented. Some projects were very clear about this in terms of the fact that the employment conditions and vulnerabilities of such workers had not previously been well understood or that union structures were simply not 'fit for purpose' for the representation of such workers. In some cases projects sought to reach out to such workers with the aim of extending traditional union territories, in other cases outreach was seen as valuable in wider social and community terms not just in terms of extending membership of the union.

Such outreach activity can be seen in notable projects by BECTU, BFAWU and the GMB. The BECTU project *Challenging the Creative Labour Market* sought to engage with the problems facing new entrants, typically younger workers, to the creative sector. It is common for such workers to take on work and internships for no pay and little regard for wider employment rights. BECTU sought to engage such workers through a targeted outreach programme that included attending trade fairs and visiting colleges. In doing so, they did not look to push the agenda of the union too

hard; indeed the accompanying website for the project had only low visibility union branding. Instead, the emphasis was on raising awareness amongst such groups of workers of their legal employment rights, for example in relation to the National Minimum Wage. The union thus presented itself as an expert in the sector that workers could come to for information, advice and guidance, as they needed, and the website sought to foster an engaged community amongst new entrants where they could share knowledge and experiences of working conditions.

The project by BFAWU developed a programme of outreach activities for workers in the retail bakery sector. As the project's final report notes, the aim was to develop 'a model of employee engagement that addresses the difficulties experienced by retail bakery shop workers due to isolated sites, low employee numbers at each site, isolating shift patterns and variable levels of compliance'. Such workers were classified as vulnerable not just due to organisational and employment factors, but the fact that the union's traditional structures were less able to engage and support such workers. The project therefore sought to map the retail bakery sector, visit shops and contact as many retail bakery workers as possible – some 100 were contacted in total. While the aim was to get retail workers engaged with the union, it was recognised that to do so would involve new models of representation for the union, as often such workers were reluctant to take on traditionally defined union representative roles such as the shop steward – not least for fear of employer reprisal. While the outreach activity did result in the training of some new representatives, an equally important dimension was the wider building of networks of shop workers. This outreach model was considered to be particularly successful.

While the BECTU and BFAWU projects sought to extend outreach activities to the workplace, a number of other projects sought to extend the union's remit and activity beyond the workplace. This permeated the activities of a number of projects, with the project by Community, for example, explicitly entitled '*Beyond the workplace*'. This project, as we explain below, sought to explore how the union could pool its expertise with those of various community bodies. The GMB project sought to develop a new methodology for community engagement. As the final project report notes (GMB Final Report, 2012: 38), '[B]efore the project GMB did not have a systematic, tested and proven methodology for engaging with vulnerable communities outside of a workplace setting'. This was the case too for many other unions. The project sought to explore how the GMB could train its regions to engage with its varied local communities, and pilots in a number of localities and communities were undertaken (for example, with Polish communities in Walsall). The project sought to develop its ideas with reference to the concept of social capital and how bonds could be extended within communities and between the needs and interests of communities and the role of the GMB. The GMB learnt more about the communities as a result of the project and more concretely specific issues of vulnerability; while there was a focus on empowering communities to understand and advance their employment rights and wider social capital. The project concluded that it was successful in terms of building long-term relationships of reciprocal learning that would allow the GMB to provide sustainable support for vulnerable communities. As the final report notes:

'Through training sessions such as Tooting, Streatham and Leeds, the GMB has developed an understanding of the needs of community organisations



and created civil society links, that if cultivated will enable the GMB to contribute effectively to the building of social capital. This has contributed to an awareness amongst GMB representatives and officers of the workings of different faiths and cultures through engagement’.

**Table 3: UMF3 projects’ activities and outputs**

<b>Union</b>	<b>Project title</b>	<b>Activities and outputs</b>
Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU)	Challenging the creative labour market: moving young workers to centre stage	Project focused on vulnerability of new entrants and young workers, by developing web-based IAG, awareness raising and outreach activities. Attended 25 trade shows and 60 colleges; launched <a href="http://www.creativetoolkit.org.uk">www.creativetoolkit.org.uk</a> , extensive internal and external dissemination
Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU)	Co-operative agencies for entertainment industries freelancers	Looked at vulnerability of freelancers that use agencies in the sector. Involved background research, extensive internal dissemination, two working parties considered new co-operative agency model and a business plan for this drafted. See: <a href="http://www.uk.coop/creative">www.uk.coop/creative</a>
Bakers, Food and Allied Workers (BFAWU)	Reaching Out	Focused on outreach with vulnerable workers in retail bakeries. Conducted research in pilot region, developed model of Target, Talk and Train, trained 10 officers, visited 300 shops, contacted 100 workers, developed new ‘shop communicator’ role and trained 16 people, established ‘right4retail’ Facebook page.
Community	Beyond the workplace: community in the community	With ACEVO, explored third sector relationships to respond, support and empower vulnerable workers. Joint initiative with Polish community, developed leaflets with Rotherham LASER credit union, provided financial advice to 300 redundant workers, distributed 500 employment rights leaflets, published Toolkit, held 2 dissemination events.
General Federation of Trade Unions (GFTU)	What to expect when you start work	Developed new employment rights services to support vulnerable workers, working with key external partners. Hosted 9 regional employment rights fairs, printed 20,000 booklets, trained 32 trainers and 39 equality representatives, developed new courses.
GMB	Engaging communities and building social capital	Focused on working with vulnerable communities beyond workplace. Included research, new training pack, community engagement methodology, training sessions in and engagement with communities, booklet and regional road shows.
National Union of Journalists (NUJ)	New Networks: giving journalism’s vulnerable workers the support they need	Provided support to newly qualified, freelance and casual journalists that face exploitation at work. Overhauled NUJ communications systems, changed

		membership system, redesigned website with social media interface (4000 signed up to Facebook group), new mentoring scheme introduced and 30 mentors trained.
Rail, Maritime Transport Union	New website and training for vulnerable workers	Focused on assisting vulnerable workers across RMT areas. Involved research and mapping survey, vulnerable workers awareness course, dissemination and new Branch officer role for vulnerable workers.
Trades Union Congress (TUC)	Supporting unions to tackle vulnerable employment	Focused on the TUC's strategic goal to tackle vulnerable employment. Involved setting up Basic Rights@ Work website, new training packages and online modules, engagement with enforcement bodies, supporting videos and enforcement guide, wide-ranging outreach to community groups, advisory and dissemination materials, new methods for engaging vulnerable workers and hosting UMF network meetings.
Transport salaried Staffs' Association (TSSA)	Tackling Dyslexia discrimination in the workplace	Focused on supporting staff with dyslexia in two pilot companies. Involved site visits, workplace event and fact sheets. 2500 information packs and 8000 leaflets distributed, 18 line managers and organisers trained and 12 reps, new training materials.
Union of Construction, Allied and Technical Trades (UCATT)	Building a stronger union: protecting vulnerable workers	To set-up a Vulnerable Workers' Unit. Involved setting up unit, out-reach and joint working with community organisation, research, events, written materials and information, advice and guidance to vulnerable workers. 21, 172 individuals assisted.
Union of shop, Distributive and Allied Workers	Engaging vulnerable workers	Sought to develop USDAW's capacity to identify and connect with hard to reach vulnerable workers. Involved home study course, successful community event (attended by 500), best practice guide to e-campaigning, development of various social media, video and web applications, internal dissemination and advisory materials (to 20, 000 people).
Unison	Hidden workplace	Focused on vulnerable employment amongst outsourced workers. Involved an initial staff survey (with more than 100 responses), staff training, outsourced workers' training (three courses, activity in 8 pilot branches, development of strategic plan.

The second innovation across UMF3 projects related to ***new models of communication and social media***. The enhancement of technological capacity has been a running theme across all three rounds of the UMF. In earlier rounds this was apparent in the upgrading of union websites from relatively static sources of information to more interactive membership tools. There was also some experimentation with text messaging. This was taken much further in UMF3. Many of

the projects (eg, BECTU, NUJ, and the TUC) had dedicated websites, but there was more engagement with social media and the wider uses of digital media. These projects went beyond the fad of just updating websites. For example, the project by the NUJ looked at providing support to newly qualified, freelance and casual journalists, who, according to the union's final report, 'face exploitation at work and are isolated from normal structures in the industry'. In addition to upgrading their membership database system and a totally revamped and more interactive website, the union was looking to run online surgeries to support members and established a Facebook group that had attracted 4,000 members.

The most innovative initiative, however, was undertaken by USDAW, which sought to experiment with new methods in e-campaigning, involving a range of online tools. A key objective of the project was to raise awareness of the Agency Workers' Regulations and their potential impact. The project included a campaign specific website ([www-fair-ground.org.uk](http://www-fair-ground.org.uk)), online (home-study) training packages and a series of informative videos that aimed to get the message across about the exploitation of agency workers in the simplest way possible. The project also used Facebook, after initial research for the project had found that this was widely used as a means of communication amongst the migrant community (a target group for the project). The most notable aspect of the project was how the project contributed to the potential sustainability of e-campaigning. As the final report notes, 'whilst developing the campaign model for this project, it became evident that our internal systems were not compatible with the new technology [we] needed to manage and run an e-campaign'. The original intention had been to outsource much of the e-campaign work, but the union looked to run it in-house using 'off-the-shelf', open source software. This had the benefit of developing, previously unanticipated, in-house capacity. While this process challenged the union's existing technological capacity it also prompted the union to think about how to develop its technological systems for the future and also strengthened inter-departmental working within the union to support in-house e-campaigning. The final report concluded that the longer-term benefits for the union were 'reduction in the cost of consultancy/ agency (which also takes time to co-ordinate) and flexibility to mix, match and change systems in line with business needs without incurring further costs'.

The third innovation was the development of ***new models of representation***. Again, this had been given attention in previous rounds of the UMF, notably with regard to the dedicated focus on union equality representatives in UMF2. Across UMF3 projects a number of new models of representation were apparent, based both at the workplace and beyond it. The project by BFAWU developed a new network of 'shop communicators', based on an engagement strategy referred to as the three T's – Target, Talk and Train. The basic assumption of this approach was that the traditional role of the shop steward would not be appropriate for the retail bakery sector. As the final report explained:

'The traditional role of shop steward is off putting to many with the common perception that it is a big undertaking, requiring knowledge of issues such as employment law and union rules. BFAWU recognises this and is keen to develop a new role of 'shop communicator'. Shop communicators will not be expected to take on traditional responsibilities such as local bargaining or representation. Their main job will be to share information with the union

about local issues and take information back from the union to share with colleagues. Over time, these communicators will become reference points or knowledge centres at workplace level providing two way information and advice for colleagues who can feel isolated and vulnerable.’ (BFAWU: Final Report: Annex)

The Target, Talk and Train model entailed 19 union officers engaging with retail workers, often organising informal meetings outside the workplace. In total, more than 100 workers were contacted in this way and 16 shop workers were trained to form the initial network of shop communicators. Their role was then to reach out to workers in other shops and workers. This seems to have been a successful intervention and the union appeared optimistic that it offered a way to reach beyond the usual boundaries of the union, representing a sustainable model of engagement for the future.

Other models of representation across UMF3 projects included the trialling of mentoring arrangements, such as community mentors in the GMB project and the training of mentors to support freelance workers in the NUJ project. More widely, projects included systematic attempts to engage with and support vulnerable workers through new institutional set-ups, such as the Vulnerable Workers Unit established by UCATT (discussed in more detail below), and a new type of cooperative agency for freelance workers by BECTU, as well as new branch roles and configurations. In the case of Unison the project involved eight branch pilots to explore how best to support vulnerable workers, while in the case of the RMT a new branch officer role dedicated to supporting vulnerable workers was established.

The fourth notable example of innovative activity related to one of the central themes of UMF3 (notably themes 1 and 5), ***engagement with external communities***. There had only been selected examples of such external engagement across the first two rounds of UMF, but across UMF3 projects this was extensive, with all projects in some way working with or engaging external communities. This took a number of different forms.

There were projects such as those by the GMB and USDAW that engaged with community groups, through some form of on-the-ground road shows, pilots and events. The community event organised by USDAW as part of its project was the first time the union had ever organised such an event. The event was held just outside Edinburgh in an area consisting of two major USDAW recognised workplaces employing agency workers with a strong Polish and Romanian community. The event attracted 500 people and was organised in conjunction with the local church and community bodies and aimed to be a family fun day. The union sought to raise awareness through the event of how individuals could access information about employment rights and how unions could help to improve their working lives. A number of short video clips were produced from the event and disseminated via USDAW’s wider e-campaign.

A number of projects were conducted in partnership with external bodies. The purpose of this was to add extra insight and expertise to projects that unions lacked. This included projects by Community conducted in collaboration with ACEVO and by BECTU conducted in partnership with Cooperatives UK. The Community project

sought to explore, via a number of initiatives, how unions and community bodies could work closer together, pool their expertise and learn from each other for the benefit of vulnerable workers. The project by BECTU sought to develop an alternative model by which freelance workers could find work in the creative sector. The project sought to develop an employment agency based on the model of a cooperative, to offer an alternative to the upfront book fees demanded by existing agencies. BECTU worked with Cooperatives UK, in conjunction with a number of internal working groups, to establish the formal terms of reference for what a cooperative agency may look like. The GFTU partnered with organisations such as the Equality and Human Rights Commission (EHRC), the Recruitment and Employment Confederation (REC) and Thompsons Solicitors. The latter helped produce 6, 000 copies of 6 bespoke employment rights booklets that the GFTU distributed at employment rights fairs.

Finally, there were more networked projects that worked with a wide range of community groups and external bodies, for example enforcement agencies, across a wide range of employment rights issues. This included projects, for example, by UCATT which established a Vulnerable Workers' Unit and the Trades Union Congress which sought to establish new relations with external bodies. UCATT's Vulnerable Workers' Unit was staffed by two project workers and based at the union's Midlands office. It sought to engage with a wide range of vulnerable groups amongst the union's membership base and beyond. The project included workers that: were at risk of redundancy; required advice on finance and welfare issues; were being TUPE transferred; were older, young or low-skilled; were seeking advice on health and safety; had faced abuse of employment rights etc. The Unit engaged a large number of workers and recorded that it helped some 21, 172 workers in some way, mainly via information, advice and guidance materials (18, 439 individuals), but also via case work (390), events (1, 483), drop-in sessions (183) etc. The project was supported by a wide ranging network of partnerships with external bodies. As the project worker noted, the project had:

'A clear focus on the benefits of partnership working and an extensive set of good quality relationships developed with a range of statutory bodies (e.g. EASI, HSE, GLA, CFEB and HMRC); community and voluntary bodies (eg. Community Links, Citizens Advice and local asbestos support groups) and FE Colleges'.

This resulted in a range of activities, such as joint training events on employment rights as well as collaborative publications. The project's final external evaluation report concluded that '[T]he work of these partner organisations was viewed as crucial to the relative success of this project' (Mustchin, 2012:12).

Likewise, the TUC project engaged with a large number of community bodies to promote concerns around employment rights and to produce leaflets and publications. A key outcome for this project was the establishment of closer and productive working relationships with a number of enforcement agencies. The project by Community, while in partnership specifically with ACEVO, also worked on a number of initiatives with local agencies. This included working with the Financial Inclusion Project led by Voluntary Action Rotherham to provide information around financial capability to approximately 300 members made redundant or under the

threat of job loss in the manufacturing sector; as well as working with Rotherham-based LASER Credit Union to produce a leaflet for community members about this social enterprise's financial services.

## **2.3 Summary**

The different dimensions outlined above fit union traditions and objectives in different ways. The projects sought to engage vulnerable workers and their needs through numerous routes: there was no singular template. However, these innovations and changes served as a guide for others in terms of the levels at which unions had to function: outreach work; new forms of communication; innovative representation; engagement with external communities in society; clearer ways of working with agencies dedicated to ensuring justice at work; and networking across different organisations and unions. In many ways UMF3 provided the expanse of possibilities for creating relevant trade unionism. In addition, it created a space for reflection on organisational responses. It was not just a conglomerate of projects, but a co-ordinated space which on occasions represented complementary features and a rich texture of thinking about inclusion.

### **Summary Points**

- Focus on vulnerable workers was not only related to unions' rights on specific groups of disadvantaged workers, but workers that unions had often not previously organised or represented. There was greater outreach work.
- Innovation across UMF3 projects related to new models of communication and social media which focused on specific groups in terms of websites, mobile telephony and teaching materials.
- New forms of representation and through communicators and liaison-based individuals; more flexible forms of work and labour market activity was developed
- There was a more systematic engagement with community groups and enforcement agencies in terms of joint events, training programmes and awareness raising initiatives

### **3. THE CHALLENGES OF MODERNISATION: LEARNING FROM ENGAGEMENT**

The evaluations of all three rounds of the UMF have found positive examples of innovation across projects, suggesting that the UMF was a highly valuable experiment. However, the evaluations have consistently raised concerns with regard to sustainability and mutual support across the unions. In many cases such recommendations and concerns have been responded to, as seen with the TUC's coordination role in the third wave of the UMF. Yet challenges remain, which will also need to be heeded if the positive lessons from the UMF are to be implemented longer-term. Legacies are not just about successful change but learning from how challenges arise and configure.

It was clear that projects tested internal union practices and assumptions much more in UMF3 than in other rounds, due in part to the more externally focused nature of projects. This was not just because of the focus of projects on vulnerable workers, or as the Unison project articulated it 'the hidden workforce', but because the means to engage such workers often exposed and challenged traditional ways of union working. What is more the timing of projects meant that they were situated in an economic and political context that brought a range of new and unforeseen challenges, in terms of the ability of unions to deliver on projects, but also in terms of the need to engage with increased vulnerability itself.

As in previous rounds unions faced both internal and external challenges, which ranged from the mundane to the more significant. Some of the challenges were identical to those faced across the first two rounds of the UMF, and largely related to the specific internal constraints and uncertainties of delivering new modernisation projects and agendas. Thus, unions faced the usual challenges with the implementation of new technological initiatives and the design of new websites. This typically took longer to organise and implement than initially anticipated. A good example would be the project by BECTU focused on new entrants to the creative industry. The launch of the website took longer than planned because it became clear that a more interactive platform would be preferable to a largely static website (see also the NUJ project). The project manager noted that a 'longer lead time was more preferable'. This was, however, a minor problem and any delays appeared strategic rather than structurally embedded. Indeed, it is worth highlighting that this project had learnt from protracted delivery problems and commissioning experienced during its UMF2 project to the benefit of the UMF3 project; having overcome initial contractor problems, it now had an established and trusted contractor to work through delivery problems with.

More generally, projects faced the usual challenges of engaging key constituencies, be they members, union officers or employers. These issues are considered below against the wider challenges faced by projects in UMF3.

The first challenge related to understanding the ***nature of vulnerability*** itself. Vulnerable workers were often difficult to identify and hard to access. How to access such workers was often the basis of many of the projects, including the Unison project which sought to examine how the union could represent vulnerable workers through different pilot cases. Not only did such workers fear talking to unions (in case of management reprisal), they were also not always that open or interested in traditional ways of trade union representation (see the BFAWU case, for example). Communication channels with such workers were, therefore, often problematic.

The mainstreaming of work and links related to vulnerable workers were not straightforward, not least because what constitutes vulnerability was often a matter of debate or misunderstanding within some unions, both in terms of the views of potential constituents and also union structures. For example, while the BECTU project on agencies started off with the premise that the practices of agencies were exploitative this was largely accepted by members themselves. As the BECTU project manager noted, 'there was a recognised problem in the industry, but how to address it was not so obvious as workers are not necessarily that driven to change matters, due to established norms within the creative labour market'.

More common were views amongst some union cadres that they did not have vulnerable workers as such within their representative constituencies. This proved a particular challenge for the GTU project which was looking to engage from across unions for its training courses on vulnerability. As the GFTU project manager explained, 'some of our affiliates don't see that they organise vulnerable workers, and clearly they do but they don't see it that way'. This also proved the case for those unions whose members was largely located in the public sector, but whose membership, or potential membership, was increasingly located in outsourced firms. It was clear that understanding amongst union officers of the conditions such workers faced was often limited. Projects by Unison and the RMT were devoted to exposing the often shocking employment conditions within outsourced suppliers, and in doing so increasing understanding amongst, and support from, union officials for representing such vulnerable groups.

Nonetheless, it is important to recognise that getting union people on board to see the projects and the focus on vulnerability as a 'bread and butter' union concern was not as straightforward as one would imagine even with a long history of representing the underprivileged and weaker parts of society. For all the traditions within the trade union movement of working with disadvantaged workers and groups in general the space within which they organise remains focused on the stable and relatively more secure workforce. Many of the projects and their project leaders registered concern with some of the internal obstacles to their activities. The vulnerable workforce was not always high on the agenda due to the demands of the core membership which needed servicing, the changing nature of the core employers and the demands that brought to the unions, and the mentality of some trade union leaders and officials that had not really come to terms with the sheer scale of vulnerability within the labour market and society.

A second, and related, challenge was whether projects should focus on the **consequences or the causes of vulnerability**. For the Community project it was the former, while the RMT seemed to be looking more broadly at the latter. These



brought with them very different agendas in terms of how issues and awareness of vulnerability was to be tackled. Should the focus be the organising of those affected as for example communicators of rights and links into vulnerable workers or should the focus be on analysing and challenging rogue employers and the structural factors causing the increasing fragmentation of the workforce? There was an overall emphasis on alleviating the consequences, but in some cases policy interventions and reflection were also seen as essential. These dilemmas and choices were balanced in some projects, such as UCATT's, where advice work, coalition building, policy documents and training were linked into a general shift in union focus and policy on vulnerable workers - although balancing these dimensions was a challenge in itself.

The causes of vulnerability were clearly related to the **changing nature of business organisation**, privatisation, outsourcing and the increasingly fragmented nature of employment. How to engage with the vulnerabilities of workers within such employment contexts was the third challenge. This was explicit in the RMT and Unison cases, which highlighted shocking abuses of workers' rights. There was a problem for projects in ascertaining the locus of employment for some workers and engaging employers more generally. In the TSSA case there seemed to be some evidence of changed employer practice. However, the changing nature of the employer, the greater element of fragmentation and the problems related to a more disorganised system of capitalism was such that bridges into the vulnerable workforce were never that clear. In the initial phases of the UMF (1 and 2) partnership and working with employers was a feature of the modernisation agenda, but in UMF3 the position of various employers and agendas were less accessible and hence working with employers was in many cases even less of an option.

In some cases this meant projects had to slightly modify planned outputs. For example, the USDAW project has planned to develop a negotiator's guide, but it did not prove possible to engage new employers with the project. In this case, employers had been much more successful in lobbying government around the specific of regulation for agency workers, meaning the union was to some extent playing catch-up. Rather than focusing time and resources on trying to sign up, potentially unsuccessfully, employers to the project, the union focused its efforts elsewhere, and produced a number of facts sheets and leaflets in place of the negotiator's guide. Engaging employers was, however, a more general issue, which as the GFTU project manager explained could impact on the ability of unions to support projects:

'In the end which was an unexpected challenge was getting the reps and the activists onto courses. In the economic climate people were not getting released to come on the training in a way that they would have been a couple of year before. We found that really difficult, employers were really clamping down on that.'

This is not to suggest that there were no successful examples of employer engagement. The initiatives by BECTU, did achieve some success in engaging employers, in this case through getting a number of key employers, such as the BBC, to sign up to a potential charter for fair conditions for the conditions for agency workers. Likewise, the project by the TSSA was based on two employer pilots

looking at dyslexia, although much effort was needed to get ongoing support for the work of the project and recognition of the issues of vulnerability involved.

The changing nature of business organisation and the new geography of employment meant that in order to understand and engage with vulnerable workers unions had to look outside their traditional heartlands.

This raised a fourth challenge, in terms of identifying the **new locus of union activity**. The basis of union activity is the workplace, but projects often necessitated going beyond the workplace (as the Community project put it) and there appeared to be some unions who had made a greater and more systematic effort to work with community bodies and bring in their experiences (e.g. UCATT worked closely with Community Links and learn from their methods of working in local communities). However, linking with community groups brought with it an internal political challenge, as there were a range of disparate groups and interests within local vulnerable communities and those working with them.

The fifth challenge for projects, therefore, related to how they sought to **work with new external partners and the multiplicity of community and social organisations** that can provide support for vulnerable workers. Working with external partners proved demanding, not only in terms of the steep learning curve faced in terms of working with voluntary and community bodies, but also because unions had to navigate the challenges that such external organisations were themselves facing. All projects were faced with the cultural clash that had to be traversed between the modus operandi of unions and the different operational imperatives of voluntary and community bodies. This did not just mean learning new discourses of engagement. It also meant unions spending time to identify the appropriate bodies and individuals in the first place. The two quotes below from the projects managers of Community and the GMB exemplified the challenges very well:

‘One of the hardest things was going into certain organisations and actually trying to sell yourself as a union to organisations. A lot of them are not union recognised or anything like that and basically trying to get an understanding from them that we were offering something free to them that we were experts in and that they would probably need help in. Part of that was basically explaining it, you have to go in with a “softly, softly approach and almost take your union head off”. It’s no good going in as you would in an industrial situation, it wouldn’t work. You have to feel your way in rather than jump in with both feet, you actually have to talk to them and make them understand and explain your side and where you can help and support them.’ (Community project manager)

‘The challenges initially were getting in to those communities. By definition, it was communities where we had no presence. So finding a way in; that’s to do with also the esoterics of defining what a community is, as we well know when we go out in terms of...and it was an overlaying community which is, it was a combination of geography, ethnic group, culture, class and all the rest of it. So we were able to identify specific communities that could be measured on those grounds, so that took some time. And the secondary challenge was then identifying the genuine community leaders, because obviously in any

community... there's only a number of self appointed community leaders and we had to try and work our way through making sure we have the right people on the programme that had, if you like, a mandate in trade union terms, but you know what I mean, that had some traction in the community. So those are the two key challenges.' (GMB project manager)

These issues were replicated across projects. In the GMB case, they ended up identifying 102 community leaders across their eight regional pilots. A number of other projects emphasised that it was important to 'go slowly' or 'softly, softly' in terms of how they approached such external constituencies and that they had to recognise that they could not take it for granted that such bodies would wish to engage and work with them.

This was the case even if the unions were able to promote a 'free offer' and the resource support of the UMF. There was a job to be done in terms of selling exactly what unions had to offer. Indeed, the argument that 'coalitions' were needed to lock together organisations such as unions and voluntary groups, by propagating joint working on deeper issues such as vulnerability at work, were challenged by an increasingly unstable and volatile policy environment in terms of funding. At a time when it is increasingly important for unions and third sector organisations to be working together, the means for this to happen are becoming more problematic. The changing nature of funding and declining levels of state expenditure in this area meant that more long term strategic thinking was problematic. Thus, many of the projects faced problems engaging with such voluntary community bodies not because such bodies were not open per se to working with unions, but because faced with the harsh realities of funding cuts they were looking internally at their own operations and resources and were not able to give as much time to working with unions and UMF projects as they may have wanted.

The final significant challenge, therefore, was the way in which the **external context and unfolding austerity agenda cut across many of the domains of project activity**. This challenged the basis for working with external agencies and employers, as noted above, and also challenged the internal capacity of unions themselves. While the UMF provided much needed resourcing for unions to experiment with change and kick start modernisation initiatives, the success of initiatives were dependent on wider union investment, resourcing and time – though this was not formally quantified. In this regard, unions invested significant resources of their own, but they were challenged by the time that projects required. The changing external environment had proved more challenging in this regard, as the time that full time officials could commit to projects had become more constrained, as unions became more enveloped in the political realities of the economic downturn and the unfolding austerity agenda. This had focused unions on more traditional 'bread and butter' issues, as the negotiating environment had hardened, as core members were experiencing increasing difficulties and as the industrial environment had, in some instances, become more antagonistic.

This had left less time for exploring the nature of vulnerability and its causes and consequences, while at the same time the changing environment was increasing the remit of vulnerability. The challenge of vulnerability in quantitative terms had not just become much greater but the nature of vulnerability had become much more severe

with cost savings and cuts working their way down the organisational chain and placing real pressures on workers at the lower levels in terms of working conditions and wages. Some projects proved agile in responding to this, by widening the definition of vulnerability in situ and in the case of the projects by UCATT and Community focusing specifically on assisting the needs of redundant, or under threat, workers.

It should also be noted that projects themselves had been asked to cut their budgets by between 12-15 per cent. All projects did this and still largely met their original objectives and aspirations. Nonetheless, they all struggled with the contradiction that at the same time as the external environment was making more workers vulnerable, their own capacities to support the needs of such vulnerable workers, and deliver the aspirations of modernisation projects, were challenged. That projects continued to completion and delivered a range of successful outputs was testament to the commitment of unions to expanding their remits to encompass vulnerability. Responding to the challenges identified, within an increasing difficult external climate, proved to be the day-to-day backdrop of projects; and in facing such challenges projects learnt a lot about what unions needed to do to represent vulnerable workers more effectively.

The role of key individuals at BIS in the history of the UMF needs to be noted as well. BIS did not just oversee the funding of the project and the ethical use of public funding. The civil servants related to UMF throughout the three stages managed to attend and follow the innovations very closely not solely with a view to recording and archiving them. They were able to link projects together, contribute to synergies between them, and provide advice within the individual project structures and allow for greater dissemination. Working directly or through specific union officers and project managers, BIS was able to create a basis for a greater sharing of ideas which was noticeable even when BIS itself was being the object of restructuring and change. The handover of UMF work was well co-ordinated within BIS as it went through different generations of civil servants.

### **Summary Points**

- There was a problem with identifying and surveying vulnerabilities – research co-ordination and using existing structures to identify the main causes and points of engagement remained
- There remained a problem with finding non-workplace locations and venues that allowed for innovation and alliances to be established – and for vulnerable workers to be catered for.
- Reaching hard to organise and sometimes almost hidden workplaces remains an issue for regulation and enforcement – the changing nature of business organisation and complex value chains are an issue
- Challenges related to how the unions sought to work with new external partners and the multiplicity of community and social organisations that could provide support for vulnerable workers and sustain these relations long term
- The external context and unfolding austerity agenda cut across many of the domains of project activity.

## 4. Transformation and cultural change: Enhancing sensitivities and focusing actions

Irrespective of the challenge faced by projects, there was evidence of real reflection by unions across UMF3, even if there was some debate around what constituted union innovation. There were plenty of examples where the deliverables of projects were suggestive of potential change within unions, by virtue of the fact that: officers were more highly trained; training modules were being rolled out; technological applications were impacting on and changing administrative functions; there was a greater general level of awareness of planning and strategic reflection. Many unions had managed to develop new project management skills as a direct consequence of the UMF and had started to think through the need for ongoing innovation and change. There were some clear examples where established ways of working were changing due to the way that new partner organisations - such as Community Links or Dyslexia Action – had come into the remit of every day organisational activity.

While projects were generally positive about their experiences of UMF3, most were careful when assessing the extent to which their projects would lead to long-term cultural change within their unions. As a number of project managers noted, this could only be evaluated in a few years' time. However, the evaluation was done immediately after the projects were completed. It is open to debate just how transformational many of the projects will prove in the longer-term. Even those unions that were particularly enthusiastic about their projects, and indeed even the idea of modernisation, noted that they were becoming more focused on their core agendas and traditional concerns in response to external and political challenges. This is only to be expected. Institutional structures established as a direct result of UMF resources are particularly vulnerable. For example, it was unclear whether the Vulnerable Workers' Unit established by the UCATT project would remain in its original form. Likewise, project managers needed to find other roles. Yet, equally, many projects did develop an agenda and strategy for the longer-term sustainability of activities so as to ensure that the benefits of UMF3 projects were not lost. In the UCATT case the structures of support trialled by the Vulnerable Workers' Unit were being assimilated into mainstream structures and processes. Likewise, the activities of Community were being assimilated into the work of its learning organisation, Communitas. There were many other such examples and there were also signs of deeper learning across UMF3 projects that will stand unions in good stead for the future.

One key outcome of UMF3 was that the unions participating **thought more broadly about diverse labour market constituencies and workers' experiences of vulnerability**. This first meant accepting that union members or workers within

designated union constituencies may have been vulnerable. As the RMT project manager explained:

‘many representatives have come on the course believing that there was no vulnerable workers either in their workplace or in their region, but all have become aware now of exactly what a vulnerable worker is and all have become very positive about the project.’

It also meant accepting the challenging fact that vulnerable workers may not be ‘captured’ by traditional union methods. Unions recognised that they could only help vulnerable workers outside of the traditional union model. For example, in the case of GMB this meant training community leaders, or as in the BFAWU encouraging workers to become communication representatives. It was recognised that such workers may never engage with and join unions or indeed may never have an interest in unions, as in the case of UCATT which realised it would need to provide some type of free advice for the workforce in general. The activity of the BECTU project on new entrants was articulated as a ‘gift to the industry’ and the union was sensitive in developing a differentiated brand from its union services. Hence the very concept of representation was widened and broadened to include structures, communications and membership activities that would build the need to touch the ‘hard to reach’ in more systematic and thoughtful ways. The union was able to reinforce the organisational mission of engaging workers more broadly within its programmes. It had begun to consider alternative ways of creating labour market information and forms of employment for its less protected workforce.

The work was seen however as wider than outreach, as the realities of vulnerability impacted considerably on the participant unions. The unions stressed that at all levels vulnerability was increasingly seen as a core union concern. There was certainly evidence that understanding of vulnerability had been increased, in some cases there was evidence that it was being mainstreamed into union agendas around organising, for example as in the case of USDAW or through alternative models of engagement as in the BFAWU. In the case of the TSSA the UMF was seen as vital for the development of a full time equality officer and even greater commitment to embedding equality related issues within the union in terms of structures and not just policies. The various projects led to a series of changes that brought the agenda of inclusion closer into the union. In UCATT, key outreach union workers were brought closer into the union forming a permanent legacy: the needs of vulnerable workers are now deemed to be a permanent area of union work. In UNISON the vulnerable worker dimension came much closer to the agendas of the organising work of the union as the organising agenda assimilated a broader understanding of new types of workers and employment arrangement in such areas as the care industry. In the NUJ the interest in vulnerable workers were clearly more visible within the structures and practices of the union.

A noticeable development, then, was the **degree of institutionalisation** that was starting to take place as a result of the projects. For example, branches were increasingly being inscribed into the work of the projects. Meetings and reflections on vulnerability were common in many of the unions with regards to the needs and realities of the vulnerable workforce. However, the development of volunteers through the branch structure and their use for pilot projects meant that the UMF at

this stage 3 had a broader reach and involvement compared to others. The risk is always that modernisation becomes an elite project, something done in the head office, but increasingly evidence shows that it has been stretched across the organisations and brought into the branches of the unions as well. The UMF therefore has brought forward many champions and innovators into the dialogue on how the rights of workers are best defended. Again, the RMT project manager explained how this process was leading to longer term cultural change:

‘One of the objectives of the project was to change and improve the culture of the RMT by first assisting and representing vulnerable workers, then to gradually seek to involve them into the life and structure of RMT. This is certainly happening, a number of employees who were/ are vulnerable workers and are now becoming RMT reps. RMT has started to elect vulnerable workers’ officers at branch level.

Finally, UMF3 contributed more than the previous two rounds to developing learning within unions around how they might **position themselves in relation to external communities**. For a union such as BFAWU this was conceptualised in terms of how it needed to widen its remit beyond traditional heartlands, as the project manager explained:

‘It has become clear that the union needs to operate as more of a ‘community organisation’ than it has done historically. There have been occasions when workers from another sector have heard about a local open meeting and come along because of a specific problem. Although not from the sector that BFAWU organises, officers were able to offer basic advice and direct to the appropriate organisation for more specific advice if necessary’.

The role of BFAWU officers has therefore evolved and new ways of working in relation to outreach have been embedded: the use of ICT and new social media has been celebrated within the union and new ways of working with it were apparent from our data.

More generally, unions learnt a lot about the mechanics and processes of engaging with and developing joint working arrangements with different external community and voluntary bodies. This often meant navigating the different languages and terminology used by unions and third sector organisations. As the project manager of UCATT explained, a key concern was to understand how the different working cultures of unions and such bodies could interact for mutual benefit and forge ongoing relations of trust:

‘There is clear benefit of working with non-union organisations such as employment rights enforcement bodies and community organisations. This requires an open and frank approach to project delivery and the development of a culture of trust between organisations with different traditions, histories and objectives. The development of constructive relationships of clear mutual benefit reflects the value of this project strand. UCATT has been very willing to use these experiences as learning opportunities and reflect on the cultural factors that might inhibit effective, joint delivery.’

In the case of the Community project, a Toolkit was produced that systematically explained the benefits that unions and third sector organisations could accrue from working with one another. This project identified some clear lessons and recommendations of such joint working that would be of value across the trade union movement. Three lessons, taken from the project self evaluation report, are worth highlighting:

1. 'Trade unions have to have a clear 'offer' to make to third sector organisations when scoping out the potential for partnership working. This needs to be something the third sector organisation has not already got, and something that will not involve a significant input, in terms of other monetary or non monetary resources.'
2. 'Trade unions need better to appreciate the extent of the changes that will be necessary with respect to the way they operate as organisations if meaningful and productive partnerships are to be built with third sector organisations. Whilst there is talk in some circles of trade unions reaching out to the third sector, the reality appears to be that the unions expect the third sector to reach in, and embrace them.'
3. It is more appropriate to develop joint activities with third sector organisations that address the symptoms of workers being unable to access their employment rights, rather than the cause of the problem. For instance, third sector organisations are more willing to support activities to promote financial inclusion and money management, in order to address the symptoms of low pay, than to support actions designed to, for instance, enforce compliance with the minimum wage legislation'.

(Source: Community self assessment questionnaire)

In effect, the project internalised the need to think in terms of social coalitions and new dialogues were evident from the behaviour of various officers.

These lessons may well be apposite for many unions looking to start projects with the third sector. However, the more general lessons of UMF3 also highlighted the extent to which unions and the enforcement agencies can work together, share research and develop joint campaigns. This was evident from the UCATT project and also the TUC project, which identified its collaboration with enforcement agencies as the main unanticipated outcome of its project. Central to current UCATT philosophy and strategy is the basic objective of looking to seal protocol agreements with external bodies and to act as a forum and link between them around broader questions of labour markets and worker rights. The projects by RMT and Unison also showed that in some cases unions also need to fully understand the cause of vulnerability to recognise the extent to which vulnerability exists in the first place. From this, new strategies of representation can be developed – these unions have pushed this into their core organising work and key officers, and new sets of individuals have assisted with the work and sustained a concern with those workers who are outside the immediate remit of legal enforcement



The need to think in terms of the nature of the employment agency and indirect and even concealed forms of recruitment brought forth a series of responses and innovations through their monitoring, internal union awareness of their functioning, and policies and strategies to reach relevant workers engaged with them. The shift to thinking about other ways worker enter into employment that can be vulnerable in some form or another has led to many projects such as USDAW developing innovative training cultures. Their project included extensive activity, including internal workshops with staff, an on-line home study courses for representatives and activists, and union officer engagement in major community event and various social media interventions.

One thing that did strike the evaluators about the innovative work was the use of new forms of open meetings and advice events as a way of going beyond the comfort zone of the union. While unions are seen in the public eye – or have been seen- to be associated with public assemblies these are or have been normally linked to their membership and held in relation to specific employers and workplaces. Many of these cases now saw the ‘road show’ and open events as a vital part of their work in terms of disseminating information and gaining access to workers who are not supported through traditional modes of representation.

For smaller unions the UMF has become the basis of a range of networks and spaces for innovation and for the sharing of that innovation. UMF projects by the GFTU, BFAWU, TSSA and BECTU brought forth experiments around a range of novel and new practices and concerns that ultimately have led to an embedding of equality and inclusion strategies and cultures. These have allowed for new networks and dialogues which the TUC should in future consolidate further. One major feature of UMF 3 - which was more widespread than in UMF 1 and 2 – was the extensive engagement with the research community to help understand the experience of work and how it has changed (e.g. the role of employment agencies and gang-masters), and to also bring in research on initiatives and learning with regards to vulnerable workers (e.g. community unionism). Independent research agencies and universities became more closely tied into the dynamic of learning and organisational change partly due to UMF and its legacy: the Campaign Organisation, the University of Leeds, the University of Manchester, the University of the West of England, the University of Northumbria, Ruskin College, Warwick University and others.

### **Summary Points**

- One key outcome of UMF3 was that unions participated more broadly with diverse labour market constituencies and workers’ experiences of vulnerability.
- Equality related issues and questions of vulnerability were becoming embedded in terms of project officers, committees, new internal and external relations and through signs of greater organisational sensitivity
- Greater use of outreach events and open meetings was evident
- Dialogue with other unions and related bodies, and with community organisations, had broadened
- Officer and representative roles were the subject of greater discussion and change in terms of their activity
- Some embedding of research and evaluation in underpinning organisational

change had occurred.

## **5. CONCLUSIONS: SUSTAINING INNOVATION AND COMMITMENT TO INCLUSION**

Unions in the United Kingdom and Northern Ireland have come a long way since the increasing interest in questions of equality in the 1970s. There have been a range of policy related and strategic developments in relation to gender and race for example. There are challenges which remain but unions have reformulated much of their ways of working to account for the social needs and characteristics of their members and the workforce in general. The role of UMF 1, 2, and 3 has been important in crystallising this development and in creating a space of building the internal organisational changes needed to sustain it and make it more relevant.

This report has detailed the activities of UMF3 projects, the challenges they faced and the potential lessons that unions learnt while engaging with the thematic priorities of the final round of the UMF. In conclusion, it is clear that the projects funded under UMF3 built on the successes of the earlier two rounds. All participating unions had received previous grants. In some cases, the structures and administrative processes put in place, or the positions created, directly contributed to the conduct and outputs of UMF3 projects. In other words, as the USDAW project manager explained, modernisation had become a more accepted idea within unions. Despite this, projects encountered and addressed similar types of hurdles to those identified in the previous two rounds, such as getting internal cadres on side (ie union regions and branches), dealing with the uncertainties of technological change and generally managing projects to time.

Nonetheless, it is important to recognise that UMF3 was distinctive and, in many respects, more challenging in its emphasis on harder to reach workers. While vulnerability had been a topic of consideration within the union movement for a number of years prior to the launch of UMF3, the activities of UMF3 projects challenged unions in ways not experienced in the first two rounds. This related notably to understanding, and to some extent accepting, the nature of vulnerability within unions, working out within unions how they could best engage with such workers and reaching out to a wider range of relevant voluntary and community bodies associated with vulnerable workers and issues.

In conclusion the report briefly considers the main findings of the evaluation against its five central objectives, before drawing out some general points about the likely legacy of the UMF.

The first objective of the evaluation was to explore the success of individual projects in relation to both their specified aims and objectives and the overall aims and objectives of the UMF. The evidence here is relatively straightforward. All projects completed, with only a couple requiring small extensions. In the vast majority of cases projects met their stated aims and objectives and even where they did not the impact was negligible or changes to planned outputs were made for strategic and sound operational reasons. In terms of the wider objectives of the UMF projects need to be evaluated against their transformational potential in changing the way

union work was done and in their demonstration effect. Demonstration effects are changes in the behaviour of groups or individuals that emerge from awareness or observation of the actions of others and their outcomes.

Certainly, there was a relatively strong demonstration effect amongst UMF3 projects. Levels of internal and external dissemination were extensive. In part this was due to the need to engage a more diverse range of bodies than the first two rounds, but the need for projects to reach out internally to vulnerable workers and convince key players within unions of the vulnerability agenda also heightened the need for communication. The evaluation of the first two rounds of the UMF had stressed the need for some form of coordination across projects, as a mechanism to share project impact and learning. This was less of an issue for UMF3, as the TUC played a coordinating role and had established a structure of network meetings. This was to a degree successful, though it was noted by some projects that they saw little value in the network and the TUC also expressed some disappointment about levels of attendance. The key issue for unions in participating in such a network was its relevance and this related to the nature of project activity across unions. The different activities of projects reflected, of course, not only their specific organisational and environmental contexts and needs, but also how modernisation projects related to their own internal processes of transformation.

Many unions mentioned how their internal structures had developed in relation to equality departments, equality and vulnerable worker representatives, ongoing reflection on what vulnerable workers were and needed through new research agendas, the use of new techniques for union work such as mentoring and leadership training for specific groups, and the engagement with new ways of liaising with social groups and establishing innovative structures such as employment agencies and information. This has had a concrete effect on many groups in terms of different dimensions of activity:

- Awareness of employment rights amongst a range of groups
- Focused and useful labour market information for specific occupational groups such as journalists and entertainment workers
- Toolkits for dealing with disabilities and broader issues of vulnerability
- Formal and informal union representatives armed with a greater awareness of the complex nature of vulnerabilities when dealing with smaller and dispersed workplaces
- Links with community groups involved with vulnerable workers that can raise employment rights issues and more co-ordinated project activities
- Closer co-operation with enforcement agencies and public bodies which integrates closer cooperation in enforcing legal rights on targeted groups
- Social media and more extensive communication beyond traditional 'paper based' approaches

Evaluating the transformational potential of projects is therefore not that straightforward, as a mundane project for one union can significantly transform another. Overall, however, there was evidence that UMF3 projects had transformational potential for all unions, though most unions were open about the fact that a full evaluation of the outcome of projects could only be concluded in a few years' time.

The second aim was to evaluate the nature and extent of the direct benefits accrued, lessons learnt, and good practice lessons arising from individual projects. Certainly, when transformational potential is judged against benefits, lessons and good practice UMF3 projects appeared to be successful. There were wide ranging benefits and key lessons learnt. Some benefits were directly measurable in terms of the number of union officers or members trained across the round, which, as in previous rounds, had contributed further expertise and organisational capacity. Other benefits were less measurable, and were in themselves lessons learnt, such as the more developed understanding that unions accrued across the round about the nature of vulnerability and the experiences of vulnerable workers. This had contributed in a number of cases to new and emerging models of representation, such as the BFAWU communication representatives, which offered potential examples of good practice for the future.

The one benefit that could not be evaluated was the value of activities and outputs as a return to the level of state resources invested. While unions such as USDAW did have sophisticated metrics for evaluating internal cost savings as a result of projects, no projects undertook a formal cost-benefit audit. Nor could any unions specify concretely the amount of their own resources they had invested in projects. It is important to make the point, however, that all unions formally met or exceeded their contractual match funding stipulations. In the majority of cases internal resourcing had been extensive and, according to the unions themselves, certainly significantly exceeded contractual obligations.

The third aim was to consider the extent to which projects successfully handled difficult challenges or unanticipated obstacles. To some extent the challenges faced by projects in UMF3 were more significant than in previous UMF rounds, but they impacted less on projects. A key challenge of earlier rounds related to the implementation of new technological systems, which often had the potential to significantly delay projects. This was less of an issue for UMF3. In this case the main challenges related to understanding vulnerability and reaching out and working with third sector organisations. All projects were able to meet or work around such challenges and deliver productively in one way or another. In cases where specific objectives were not always achieved there was still learning from attempting to achieve them and reflecting on them. For example, the BECTU cooperatives project had a stated objective of trialling a new form of cooperative agency. While it did not prove possible to deliver on this aspiration of the project, this did not mean the project was any less successful, since it had managed to develop a fully agreed and planned model for what such an agency would look like: it is just waiting for the appropriate individual or group to run with it. In dealing with community groups and organisations in a way that had rarely been systematically considered by a union – for example the GMB and UCATT – the unions were able to build a greater internal awareness of the need for an outwards looking agenda beyond the traditional industrial relations sphere.

The fourth aim was to evaluate the extent to which UMF3 projects have enabled unions to embed longer-term cultural and behavioural change. As noted, no definitive conclusion can be made on the longer-term impact of UMF3 projects. Only time will tell in this regard. However, there are some solid grounds for optimism.

First, the research and engagement activity of projects had significantly enhanced understanding within and acceptance by different levels within unions of the need to support vulnerable workers. In most cases, this was not just seen as research undertaken or training designed that finished with the projects. Unions such as the RMT, the BFAWU and UNISON, to name just three, were consciously embedding the lessons of projects, in new branch roles, representative roles or new organising capacity. Similarly, in the case of USDAW, new ways of working had been developed internally around e-campaigning that would have longer-term benefit. Second, as part of UMF3 many unions were starting to see the value in reaching out to external groups and voluntary and community organisation to forge new ways of working and to identify new opportunities for joint working. The contextual conditions of each union shaped what this meant in practice and how this will develop in the future, but many unions stated that they would continue to explore such joint working. For unions such as Community, the GMB, UCATT and the TUC it was relatively clear what this will look like and they have supported officers in creating a dialogue on renewal.

It is important to recognise, however, that the way in which UMF3 project activity will be embedded in the longer term culture of unions, will naturally fall within the overall mission and agendas of unions. Most UMF3 projects noted that the space for innovation had become increasingly constrained as resources had been directed to more traditional union concerns – the bread and butter issues – and constituencies, in response to adverse changes in the economic and political climate: yet the dynamics for change and the need to broaden the agenda in relation to vulnerable work was being facilitated by the projects undertaken and by nature of the current crisis. But unions recognised through UMF3 that the agenda of vulnerability, and new innovations around this, was not in itself a threat to such traditional concerns or more established groups of workers given the extent of change within the labour market in the past few years. The ongoing concern is, therefore, to embed the lessons learnt through UMF into these wider agendas and internal union structures and resourcing. In many respects, trade unions have begun to engage with issues of equality and engagement in many ways and for some time. Recent evidence shows unions engaging with a range of new issues at work which are linked to the question of vulnerability and this is evidenced in the preliminary findings in 2013 of the WERS survey (van Wanrooy, et al, 2013). However, UMF 3 can be seen as one of the first systematic attempts at fusing innovation and strategic change in relation to groups of workers who are exposed and subjected to an array of negative practices and experiences in the workplace. This further contributed to bringing unions away from the ‘comfort zone’ of working for members in stable and relatively protected employment contexts. It forced the fact that the more vulnerable groups of workers had to be seen not as minor or minority groups but part of a broader tapestry of changes in the labour market and work based relations which were becoming in many ways a majority.

The final aim of the evaluation was to consider the extent to which it is possible to identify a long-term trajectory for change emerging across all three rounds. This allows for a final point in conclusion about the wider impact of the UMF. The Union Modernisation Fund represented one of the most intense and extensive moments of conscious, deliberate and coordinated innovation in the modern history of the British trade union movement. The three phases of the UMF steadily led to a wide range of

projects related to a diverse set of demands and pressures on unions in a changing economic and social context. In many cases unions managed to engage a whole new set of workers, further opened their decision making processes and provided a range of internal organisational spaces for innovation and modernisation to progress. In terms of value for public money the sheer numbers of projects and people involved as project managers or beneficiaries of change and openness was commendable. From interactive websites, new forms of disseminating information, the development of new forms of representation such as equality representatives, to innovative training and mentoring techniques, the legacy of UMF will be significant.

The UMF also created a new dialogue on matters of change and it established new networks and new forms of understanding. Unions such as UCATT, the BFAWU, the GMB, and others have used this opportunity to cement progress into a new type of open and relevant unionism. UMF1 was very much focused on internal change, while UMF 2 brought into play the agenda of equality. UMF3 created a whole new set of innovations in relation to vulnerable work and the uncertainty workers face in a globalised yet fragmented world. In this case UMF3 witnessed greater engagement with social movements, a systematic dialogue with enforcement agencies and a connection with new forms of representation within marginalised groups.

The need to maintain interest, create spaces for accessing learning materials and sustaining dialogue around inclusion in society will not come to an end with the funding of the UMF. The outputs and outcomes of the UMF agenda are or relevance beyond the trade union movement. Social organisations, social enterprises and even public bodies have gained much from the sheer volume of materials, innovations and new practices the UMF has spawned. The emphasis in the future will be on the TUC to sustain this heritage of learning and to think through ways of ensuring the wheel is not reinvented by union officials and representatives, when there are already toolkits, learning materials, cases of good practices and a range of strategic individuals that have emerged from UMF that can be drawn on. This is the real irony many may face as unions and all social organisations seek to support individuals in an ever more difficult economic and social context. Work is going to get harder, employment is becoming increasingly uncertain: hence modernisation will mean ensuring these problems are addressed. The UMF agenda has terminated and for quite limited funding the extent of innovation has been extensive: a longer term and more sustained commitment to funding would have brought a further embedding of change and – importantly - and systematic/long term exchange within and between unions on the nature and need for it.

## **Summary Points**

- There has been evidence of systematic organisational change in relation to extending the understanding of the vulnerable workforce
- Trade unions have developed an array of materials and cases in relation to vulnerable workers alongside new roles and new agendas
- The UMF has managed to act as a catalyst for unions to develop dialogues of a more structured nature around the changing nature of the workforce that builds on the work they have done but broadens the dialogue
- A major challenge remains in ensuring the legacy of UMF is not lost and that practices and innovations regarding the support of the vulnerable workforce are maintained and built on
- The sustaining of a dialogue between unions of a more systematic and coordination nature remains a necessity



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## **ANNEX A: UMF 3 PROJECT SUMMARIES**

### **BECTU: Challenging the creative labour market: moving young workers to centre stage**

The project was focused on new entrants, particularly young workers, to the creative industries. The creative labour market is distinctive in terms of an over-supply of labour and a heavy reliance on freelance labour. There is a concern that new entrants to the sector are at risk of exploitative practice. It is not uncommon for people to enter the industry for no pay and very low pay and with this are associated health and safety risks and concerns. The project involved three main strands. The first was outreach activity, through attending major trade shows and colleges and universities, whereby the union sought to position itself as the authority on issues facing young people in the industry. In total, 25 trade shows were attended and some 60 colleges and universities visited. The second was the launch of a major new web resource, *creativetoolkit.org*, offering information, advice and guidance to young workers on their employment rights, for example in relation to the National Minimum Wage and health and safety at work. The third was general awareness raising, both within the union itself amongst members and officials, and externally with the wider media and entertainment sectors. The project faced challenges in terms of its perceived outreach expertise and the design and delivery of the new website. Like many other projects, the implementation of the website took longer than planned, but this allowed the union time to think about the messages that they wanted to convey through the resource, with the final product having much more of an emphasis on interactive engagement than originally planned and low key union branding. Likewise, while demanding of time, the outreach activity was seen as a success, not least in terms of how the union communicates to younger people. Many within the union are from an older generation and to engage with younger workers meant understanding different modes of communication and language. As a consequence of this, the project contributed to ongoing change in internal behaviours and practices within the union. Not so much in terms of its working structures, but in terms of the issues facing new entrants and younger workers in the industry and their degree of vulnerability.

### **BECTU: Co-operatives agencies for entertainment industry freelancers**

The project looked at issues around the vulnerability of freelance workers who use agencies in the entertainment industry. This is an area where the potential for exploitation is high, as agencies typically charge up-front 'book fees' for freelancers to register with them, regardless of whether they get any work with the agency. The project contained two components. The first was a research project to understanding more clearly freelancers' experiences of working with agencies. This included a survey of 8,000 members that generated 500 responses, with the findings detailed in a report published on the project's website, 'cooperative cast and crew'. This was followed by a feasibility study to ascertain the potential for putting together a new type of cooperative agency. After some marketing of this idea, the project set up two working parties, to cover film extras (involving 12 members) and technical crew (involving six members). The feasibility study was conducted through working in

partnership with Cooperatives UK. The project experienced some communication problems and membership apathy. There was an entrenched view that the current system of agencies could not be changed and the cooperative concept was not well understood. Nonetheless, a model for a new type of cooperative agency was formulated and a business plan developed. The original aim was to then trial the agency, but this did not prove possible as the right person to lead this could not be identified: the project stalled at this stage. More generally, the union had some success engaging the industry with the idea and also formulated a code of practice for agencies which it discussed with the two leading employer bodies in the sector, the BBC and PACT. The wider success of the project related to educating members in terms of cooperatives, what they are and what they can offer. BECTU now has a clearer picture of freelancers' experiences of agencies and this has been widely promoted throughout the union's structures.

### **BFAWU: Networks, Social Relations and New Forms of Support**

Food retailing has a wide range of workplaces and groups of workers who are under-represented by the unions and who are more exposed and isolated. These workers are exposed to a range of problematic practices from managers and employers. Shift patterns and working practices make it difficult to seek support or exchange experiences with respect to work. The scale of such workplaces can prohibit a systematic form of worker representation as well. In one formally unionised firm there was no clear databases of shops and the union had to rely on Google maps to sketch out where they were. This project focused on developing social media as a way of reaching such workers and of linking individuals within a city or town together. The development of networks and meetings allowed the union to gain an insight into the dynamics of such places and this contributed to union officers and representatives adding this type of outreach work to their portfolio but developing this through such networks and social media. A range of materials were developed to explain and raise awareness of workers' rights and employer obligations. A challenge with such a project was the attitude of employers and the failure to understand the need for workers to have time and resources to seek support. Getting people released for meetings was a common challenge which led to the union trying to hold such meetings in the evenings. The networks and activities moved into other retail outlets as many of the problems were common and in Burnley the union was able to establish an innovative community of workers and trade unionists. The need to think across sectors and across workplaces was genuinely engaged with and union officials reflected on their own traditional practices and ways of working. The trade union felt that the future needed a greater employer and government commitment to creating a body which brought them and the union together to discuss such workers and the needs they have as such UMF type initiatives in themselves leave the union alone in dealing with an increasingly fragmented workforce.

### **Community: Beyond the workplace: Community in the Community**

The aim of the project, which was undertaken in collaboration with ACEVO, was to build relationships with third sector organisations in order to develop joint

programmes of activities that respond to the needs of vulnerable workers. The project was an ambitious attempt to work with a variety of the third sector organisations outside the traditional workplace context of trade unions. It was piloted in the South Yorkshire and East Midlands regions of the union. An initial survey of Community members found that a high proportion had experience of employment rights violations. This helped to frame how the union and third sector organisations could pool expertise and resources to help empower vulnerable workers by way of new services, referral options and information. Three main cases of partnership working were developed throughout the project. First, there were a number of initiatives focused on the Polish community in the East Midlands, including a workshop in Nottingham attended by 26 people. Second, through working with Voluntary Action Rotherham around issues of financial capability, to support 300 local members recently made redundant. Third, the project produced a leaflet on the financial services available from the Rotherham-based LASER credit union. In addition, the project delivered two training sessions in partnership with ACEVO to Community's full-time staff (49 people), the majority of its National Executive Council (13 people), distributed a number of leaflets of employment rights issues to approximately 500 members in South Yorkshire and produced a detailed project toolkit on the benefits of joint working between unions and the third sector. The union faced the usual challenges of engaging union officer structures, who saw traditional bargaining concerns as a higher priority, but also a series of issues engaging the third sector. This was complicated by the changing political context which had resulted in significant funding cuts for the third sector. Nonetheless, key lessons were learnt, in terms of the need for unions to spell out their offer clearly to the third sector and to ensure they could offer something distinctive, as well as the need for unions to engage with such organisations in a careful, 'softly, softly' way. Overall, the activities were seen to have contributed to a change in the culture of Community, since the potential for collaborative working with third sector organisations has become more broadly understood and accepted within the union. In sharing the knowledge and understanding of the third sector developed by project staff, the project also created the capacity for activity to be sustained beyond UMF funding.

### **GMB: Linking into Communities and Creating New Platforms for Communication**

The aim of the project was to extend knowledge and understanding of employment rights across a range of communities related to vulnerability at work. This was based on developing more systematic relationships with such communities and extending the training and leadership capacity training within such communities. The idea was that unions can not only create new dialogues with communities beyond the workplace and approach a range of local organisations but offer training in relation to a range of relevant topics and issues. This was a novel way of looking at the question of coalition building with communities locally by creating leadership training and awareness around employment issues. Trade unions have a long history of shop steward training and training in general which can be used to enhance the skills of a range of organisations and individuals related to employment and work based issues. There was a range of community campaigns to anchor this development and local offices were opened to community groups for meetings, as in the case of the Wakefield regional office. This project was quite different to others, so interaction

with other UMF projects was not prevalent in this case. The project faced a series of challenges which were common. In the first case, identifying communities with an extensive presence of vulnerable work and employment is never straightforward. Leadership structures within these communities are unstable and not always clearly identifiable. However communities were selected on the basis of the relations and access local union officers already had. Sustaining these links and creating a broader culture of training and leadership capacity building will provide the GMB with a challenge but the novel and innovation aspects of the project suggest that unions have much to offer local communities not just in terms of industrial relations knowledge but also communication and organisational skills.

### **GFTU: Supporting Services for Engaging Vulnerable Workers**

The GFTU as a union confederation faced a new set of challenges related to its affiliate unions being unable to engage and represent the growing number of vulnerable workers. There was a perceived need to develop specialist knowledge and an employment rights service that could be used by unions. A range of leaflets and pamphlets were developed by the GFTU along with more focused and specialised documents. These materials were linked to the website and developed into downloadable formats. This was a major shift in the working of the GFTU as it began to focus on the modernisation of the information and communication services it offers. In this case these were backed up by a series of events and open meetings – employment fairs - based on providing support and advice. The problems facing the project were once more related to getting union representatives released from work for such meetings and convincing employers to do this. It was felt that there could have been greater dialogue between all the UMF projects, as many of the materials may have already existed elsewhere, thus avoiding duplication. The project workers also felt that such activity, without clear supportive frameworks of legislation and sympathetic policy makers in government, would be limited to the margins. Yet the project brought a new way of working in relation to creating the capacity amongst trade union representatives in relation to the vulnerable workforce and their representation.

### **NUJ: Communication and Mentoring as Strategies**

Within journalism, precariousness and instability in employment has long been a feature of various aspects of the industry, but a growing element of uncertainty and short-term work has meant that the sector has its own experience of vulnerability. The NUJ therefore used its UMF Project to develop a greater level of support and awareness around these issues. The development of a website and the use of direct emails were used for linking into different bodies of workers, such as students. Branch meetings – a common feature of UMF 3 initiatives – included discussions and invited new recruits and freelancers into discussions, with the aim of creating a more inclusive form of activity. A major development was the establishment of a network of mentors – with over 30 volunteers trained – and this allowed a more personal and supportive approach to emerge. The project faced common challenges. The first was the need to update databases and renew the membership records of the union. Creating a systematic training schedule was a major step forward, but there were issues with sustaining and mainstreaming it. With such smaller unions staff turnover can be a real problem as knowledge and networks can be lost when the organisation loses such staff, especially when workloads are high

already. Mentoring relied on volunteers at a time when the union was being pressured on various fronts. However, the project served as a catalyst for an internal debate at all levels on reaching out to vulnerable workers: it 'focused people's minds on strategy', according to one NUJ official. The new website and the renewed database of members focused attention on more concise and meaningful communication. The role of communications was therefore seriously reflected on and renewed. External links with the National Union of Students led to additional work on the question of internships.

### **RMT: Connecting with Vulnerable Workers as Knowledge Carriers.**

This project was aimed at developing a new website and focused training for vulnerable workers especially in the transport sector's cleaning and ancillary staff. The transport sector has a range of workers who are increasingly employed through agencies and through subcontracting arrangements which provides difficulties when dealing with their condition of vulnerability. The focus of the union has been mainly on permanent or more stable workers given the nature of work in railways and other related forms of public transportation. The aim was to bring vulnerable workers into the discussions and activities of the unions so as to provide a bridgehead of support. The union's branches were brought on board with representatives developed to focus on these issues and types of workers. Links were established with local trade councils and Thompsons the solicitors as a way of broadening the set of activities and the process of internal organisational learning. The project was able to raise awareness of the culture of violence and abuse that vulnerable workers are exposed to, with women being grossly mistreated due to their status. In terms of challenges there were various. Changes in BIS during the project provided a challenge as changes in personnel meant that relations and dialogues were being constantly rebuilt. The complexity of employers with there being so many smaller agencies and employers coming into the sector meant that a dialogue on vulnerability at that level was difficult to hold. However, internal challenges, in terms of sustaining the gains made through specialised representatives and the development of training materials and their use, were perceived to be a longer term challenge.

### **TSSA: Widening the Meaning of Disability and Vulnerability**

The presence of dyslexia is becoming increasingly recognised as a workplace issue. This is a form of disability which has an effect on workers in a variety of ways, e.g., the way their written work was understood or judged and the manner in which they were viewed within work. The project aimed to develop the professional competence of union organisers to meet the specific needs of workers with this condition. Various materials and support mechanisms were developed. The challenge was that there were questions as to whether this was a trade union priority, but overtime it did lead to changes in points of view. There was close relations established with Dyslexia Action which brought insights into working with community and issues based groups. This particular organisation had valuable insights and experience into workplace activity on dyslexia and related conditions. It helped broaden the remit and sensitivity in relation to understanding the question of disability. The role of Union Learning Representatives and structures of the union was helpful in providing workplace information and support on such issues. There was some support from employers,

although more could have been done according to the union. One of the main outcomes was the emergence of a dedicated equality officer within TSSA which managed to anchor and broaden issues of equality and related discussions within the trade union. For the TSSA, the UMF was an important initiative in crystallising equality and modernisation agendas within the organisation. The website and social media dimension was further developed in relation to vulnerability issues and in this case a set of innovative materials were developed. The main challenge related to issues of time and resources: there appeared to be a pattern of representatives and workers being put under pressure within their workplaces and not having the support to always take up such new issues and causes in a systematic manner. Dialogues with other transport unions are also an important hurdle for sustaining and sharing many of the gains and innovations.

### **Trades Union Congress (TUC): Supporting unions to tackle vulnerable employment**

The project sought to build on the recommendations of the COVE report and fulfil the TUC strategic goal to tackle vulnerable employment. It aimed to provide tailored support to unions seeking to improve engagement with vulnerable workers via training and better information sharing; develop new skills in promoting and protecting the rights of vulnerable workers and integrating their needs into negotiations with employers; develop new resources for unions (specifically regarding informal, agency, younger and casual workers); encourage closer working between unions and enforcement agencies; and pilot new ways of supporting unions in the regions. The project started out with a series of regional events to examine key issues and ascertain the needs of unions, with 15 events attended by around 300 people. It was a complicated project that involved the TUC working with a large range of external bodies and community organisations, and numerous publications on employment rights were produced, including a set of migrant worker branch communication materials. Overall, four key successes were highlighted. First, was the development of a new website focused on basic employment rights at work. Second, a series of training support packages were developed, including bespoke training for full-time officers and a union representatives module on vulnerable work, which was also made available online. Third, the TUC established a UMF network forum for all successful UMF3 round projects. Fourth, the project built closer working links with employment enforcement bodies, which resulted in a series of informative videos and a guide. One of the main challenges faced by the project was its complexity, in terms of working across different functional departments in the TUC, engaging other projects to participate in the UMF network meetings and engaging with such a large and diverse number of external community bodies. Nonetheless, a number of sustainable outcomes resulted from the project and the closer understanding of enforcement agencies and the working relationships that evolved were seen as a real long-term benefit for trade unions.

### **UCATT: the Vulnerable Workers and New Forms of Alliances**

UCATT developed a project that aimed to function at various levels, but which fundamentally had at its centre a Vulnerable Workers Unit (VWU). The project built on the union's UMF 2 project that attempted to develop the strategic orientation of

the union and its officers - a fundamental prerequisite for any systematic change and responses in relation to the fragmentation taking place in the union's external environment. The new project was geared towards the development of a Unit which would deal with information requests, representation and cases emerging from the broader workforce in the sector. The new project was geared at addressing the broad range of 'vulnerabilities' encountered by workers in the construction sector and developing responses (delivered with the support of an extensive partnership network of over 30 different organisations) which included the provision of information, advice and guidance provided through different mediums of communication. The aim was to reach out to the non-core and non-membership spaces of the union. The Unit delivered a series of 'outreach' events that allowed workers to gain information on relevant social and employment rights and developed the capacity of the VWU to respond promptly and flexibly to the increasing number of both redundancy and TUPE scenarios occurring across the sector. Such gatherings brought a range of public and social bodies into the reach of workers but also served as a new alliance building strategy by the union with organisations dealing with issues in relation to vulnerable work. The union went further by building a set of dialogues with enforcement agencies such as the Employment Agencies Standards Inspectorate with whom a closer relation was established. The approach of linking strategies on vulnerable workers to a new cooperation with the agencies of rights enforcement was an innovative feature of this project. These relations were underpinned by enhancing the knowledge and understanding of the union in relation to the changing workforce: this was developed by engaging with social organisations such as Community Links and universities as a way of developing a more focused approach to research in the area. The project therefore linked the support of vulnerable workers to a new working relation with relevant state bodies and social organisations. The challenge for such a project is working across such diverse levels and sustaining the momentum of the developments in a moment of ongoing economic crisis and uncertain political climate.

### **UNISON: Communicating Rights and Creating Networks.**

The focus of this project was addressing the needs of the hidden workforce – the workforce which is growing in numbers that have been outsourced and therefore could be subject to exploitation by unscrupulous employers. The public sector is becoming increasingly decentralised due to outsourcing and a complex chain of employers has emerged, resulting in downward pressures on working conditions and wages. The objective was therefore to run a series of pilot projects where areas were identified which had particular problems in relation to agency and subcontracted work: within these areas TUPE was explained by UNISON workers and the general framework of legislation on the minimum wage was also outlined. Reaching out to vulnerable workers and bringing them in as part of the union to assist in creating a more grounded form of communication was a further objective. Information was gathered on a range of developments in relation to vulnerability. The project was central to creating new sets of activities aimed not merely at organising or membership drives but of communicating internally and externally the ways workers can improve their conditions within such a decentralised context of work, and of creating a network of vulnerable workers who would assist with this. The challenges were varied. There has always been a reluctance to go into private sector and especially smaller firms or agency related work and this has been a considerable



cultural hurdle to overcome for the union. In addition, local trade union branch officials have been inundated with case work and calls for advice in the past few years making more strategic decision making and involvement on new issues difficult. There are finite resources within unions and the need to focus on new groups of workers that are in effect harder to reach has been a challenge especially in the current context of austerity measures by the state, which have meant that dealing with restructuring has absorbed much of the work of the union. However, a framework of action and network of individuals was developed that was brought more closely into the union and which had clearly identifiable internal champions and leaders located in strategic points to ensure the continuity of the work. This is vital for ensuring that such initiatives are sustained. The position of the project manager and key leads is an important dimension in maintaining the lessons of a project.

### **USDAW: Engaging vulnerable workers**

The key goal of the project was to expand on traditional methods of communication. Many of USDAW's members in the retail sector can be considered as vulnerable and there are difficulties organising such workers, notably agency and migrant workers. The project sought to examine the best way to reach such vulnerable workers, engage them and help them with their rights. The main aim was thus to innovate through new modes of communication and the use of social media, as a means to organise vulnerable workers. Specifically the union sought to develop a communication campaign to raise awareness of the Agency Workers' Regulations, which included various innovations in e-campaigning. The project included extensive activity, including internal workshops with staff, an on-line home study course completed by 500 representatives and activists, a major community event and various social media interventions. The community event was held in Broxburn, Edinburgh, a locality with a large population of migrant workers, and supported by a local church, the police and a leading employer in the area. Attended by 500 people, the event sought to provide information about employment rights, but was organised in a fun and social way built around workers' families. The wider e-campaign developed from an initial finding from earlier research that Facebook was widely used as a means of communication amongst the migrant community. The project therefore set up a dedicated website ([www.fairground.org.uk](http://www.fairground.org.uk)), supporting social media (such as Facebook) and short and simple videos. This activity was supported by the Campaign Company. The project faced a couple of major challenges, beyond the usual internal communications and engagement issues. It was difficult to engage agency workers directly, via focus groups, as their employment status was subject to change. Likewise, it was a challenge to engage employers, and a planned negotiators' guide was not developed because of this. Nonetheless, the project did conduct some pilot activity in one major employer, raising awareness of the union to groups of BME workers and there were a number of wider successes. First, the range of communications was extensive, with some 20, 000 pieces of 'physical' information about the Agency Workers' Regulations distributed. Second, the innovations trialled during the project were incorporated into the union's internal media functions. The original intention was to commission external video productions, but as a result of the project the union experimented with open access media tools and produced its own videos. This resulted in increased collaboration between departments within the union and a desire to develop the union's own in-house expertise for future e-campaigns.



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