

BIS | Department for Business
Innovation & Skills

**UNION MODERNISATION FUND –
ROUND 2**

**ASSOCIATION OF TEACHERS AND
LECTURERS (ATL)**

SEPTEMBER 2010

ATL - Developing 'Excellent Branches'

Introduction

ATL, the education union, supports 160,000 members - teachers, lecturers, support staff and leaders in maintained and independent schools and colleges - across the UK. The union already had a well developed modernisation strategy, including a year-on-year strategic planning process. At the heart of both its modernisation strategy and the strategic plan was a commitment to deliver increased support to reps and branches to enable them to respond effectively to ongoing changes in the workplace.

The two most significant changes in workplaces identified were (and remain):

- the increasing bargaining autonomy for schools and colleges, within the maintained sector and beyond – academy and trust schools, for instance
- the increasing diversity of workplaces and roles in which ATL members work – from nursery schools to further education (FE) colleges, from teachers and lecturers to support staff.

These changes in workplace structure and autonomy had (and continue to have) a significant impact on the role of lay activists – workplace reps and branch officers alike. Workplace reps are increasingly required to undertake formal bargaining with their head teachers and principals. While pay bargaining is not devolved to maintained schools, much else is, including the implementation of numerous national agreements and initiatives, such as performance management and workforce remodelling. Outside maintained schools – in FE colleges and independent schools, for instance, as well as academy schools – all aspects of contractual terms can potentially be negotiated at workplace level. Mark Holding, Head of Recruitment & Organisation and UMF Project Manager, explains:

'The importance of, at once, both extending the reach of ATL's rep network into as many of the workplaces in which ATL members work, *and* providing the support – information, expertise and training – to ensure that the rep network has the skills to be able to undertake these new local bargaining responsibilities effectively consequently was (and is) central to our strategy. Critically, the union's ability to deliver this support directly to reps and to work on the ground to identify reps in as many workplaces as possible depends on modernising the capacity and role of its network of branch officers. ATL has a network of almost 10,000 workplace reps. the reps' first port-of-call must be branches. Supporting such an extensive network directly from the union's national centres – notwithstanding enhanced web resources, telephone helpdesk and hard-copy material support that ATL provides – is simply not possible. This requires our branches to re-cast their role. Continuing their long-standing bargaining interface with local authorities' remains important, but it is no longer sufficient. Increasingly, they need to interface and engage directly with their workplace reps, acting as a source of advice, expertise and training. Identifying new workplace reps to replace those retiring, and likewise to succession plan for branch officers themselves approaching retirement, must also now be a top priority for branch activity, alongside their representative responsibilities.'

Why this project?

At the outset, there were a number of modernisation bottlenecks that ATL wanted this Union Modernisation Fund (UMF) project to impact positively upon:

- ATL had only 44.5% of reps' email addresses and that density was increasing by less than 2% per year, hampering the union's (including branches') ability to communicate effectively and quickly with an evermore key audience.

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- There was little or no reliable information on the equality and diversity of the rep network, beyond their gender, limiting the ability to deploy a targeted communications and support strategy (or to know whether such a strategy was needed).
- ATL had invested significant budget to: (i) web enhance the membership database (My Branch Membership) so that it could be accessed remotely by branches; (ii) install a new bulk email system (eTelligent); (iii) develop a template to host branch websites. But they could not afford to train branches face to face on how to use any of these systems to their full potential, relying instead on a telephone IT helpdesk.
- Generally, the branch network received fairly limited training, beyond a two-day induction upon first taking up office and termly one-day national briefings which **'were necessarily information heavy and skills light, holding back their confidence and capacity to take on new and urgent tasks and roles, such as succession and branch development planning. This project therefore was a direct response to demands from activists for better training and support to help them be effective in these new roles'**.
- a project team of staff, meeting at least termly and sometimes monthly where warranted by project activity
- a steering group, meeting at least termly, consisting of the project team plus a representative group of elected members – one national officer, the chair of the branch relations committee (through which the steering group reported back to the executive committee), plus three branch secretaries nominated by that community themselves and an observer from the Department of Business, Innovation and Skills (BIS). Both project team and steering group were chaired by Mark Holding.

The project team looked after the day-to-day operational delivery of the project outcomes, regularly reviewing and updating a shared project plan spreadsheet reflecting project tasks, responsibilities and timelines.

The steering group provided valuable input into project planning, ensuring project delivery reflected the reality on the ground for branch secretaries and reps, whilst also monitoring the delivery of the outcomes and expenditures via the project plan and termly claim forms. Adds Mark, **'It also played an extremely useful role in disseminating the achievements of the project to the wider branch secretary community via oral updates at termly branch secretary meetings, and at the very outset of the project, insisting that the project should be known within the union by a more user-friendly name – 'Excellent Branches'.'**

Methodology and outcomes

Reps' email density

The first element of the project was to engage a third party to conduct a telephone survey of the rep community to gather their email addresses, in order to improve the reach and effectiveness of e-communications with this vital group of active members. The target was to increase rep email addresses held by 50%.

Accordingly, during the summer of 2008, calls were made to 3,163 rep and contacts for which the union had no email address but did have a telephone number. At least

ATL had already committed major resources to improving IT infrastructures, including new systems designed specifically to support the evolving roles of reps and branches. The UMF project would enable them to train the branch officers' network to make the most effective use of the new IT – and other – systems and resources. It would also enable them to improve the reach and effectiveness of both national and branch communications by increasing the email density among the rep community and by providing an up-to-date snapshot of the diversity of reps.

Project governance

The project was overseen by:

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three attempts were made on every number, resulting in 2,063 successful contacts, of whom 1,572 (71.4%) provided their email address. Another 16.67% said they did not have an email address, with another 12.05% either refusing to provide their email address or refusing to take the call.

Diversity profile of reps

The second element of the project was to use the increased community of rep emails to conduct the union's first ever online activist profiling exercise, with a target of a 60% response rate. Says Mark Holding:

'Up until this project, the only mechanism by which the union collected equality and diversity information about its members was via the membership form. But in the context of a lengthy form that also requires banking and home/work contact details, completion of this information was extremely patchy. While we held gender information for almost all members, we lacked dates of birth for around a quarter of our members, lacked race and ethnicity information for a majority of our members and held almost no statistically significant data on faith, sexuality or disability.'

Having never conducted an extensive diversity survey amongst active members, the steering group immediately identified likely resistance to such a survey, and sought further detailed guidance from the equality and diversity sub-committee of the executive committee. In order to maximise the response rate it was agreed that the survey should be conducted anonymously. Says Mark, 'Although this meant that the profiling would not register information directly on membership records, it was felt that it was the best way to ensure a statistically useful sample and ensure the initiative commanded sufficient support to become a regular survey.'

After appropriate input from the steering group and the equality and diversity sub committee, the survey was sent to 217 executive and branch officers in September 2008 and then to 5630 reps and contacts with email addresses in the October half-term. The response rate for each survey was 39.1% and 19.5% respectively. Mark continues, 'Although this was a little

disappointing, and well below our project target of 60%, the steering group reflected that it was still almost double the typical response rate of the union's member surveys on topics such as policy development.'

Among the key findings of the survey were the following:

- 68.5% of reps are women, broadly in line with 75% among the ATL working membership and 70% among full-time QTS (Qualified Teacher Status) teachers in England's maintained schools.
- Median age of reps is between 51-55, compared to 41-45 among the ATL working membership and 40-44 among full-time QTS teachers in England's maintained schools.
- 98.49% of reps identified their ethnic origin as white, compared to 94.6% among full-time QTS teachers in England's maintained schools (no reliable data available for ATL membership).
- 6% of reps considered themselves to have a disability (no comparative data available for membership or workforce).
- 93.2% described their sexual orientation as heterosexual/straight and 3.7% preferred not to say (no comparative data available for membership or workforce).
- 30% of those who answered other survey questions skipped the question on faith/belief, and of those who responded 79.4% of reps said they were Christian, 14% said they held no faith/belief, 2.5% preferred not to say with no other faith registering more than 1.2%.

Both the steering group and the equality and diversity sub committee reflected that the median age results confirmed evidence that members were less likely to take on the role of the rep early in their careers, and demonstrated the urgency of the union's renewal activities among this community. They also reflected that the age profile might have impacted on some of the other results

of the survey, although further cross-tabulation of results did not provide statistically reliable evidence of this.

As well as quantitative data, the survey also captured valuable qualitative data on equality issues, priorities and support that reps felt the union should focus on. This information was passed to the equality and diversity sub committee to inform their policy development work, including 199 reps, who provided contact details to become part of an equality network to help shape that policy development. Says Mark:

'Of course, equality demographics are just one element of the diversity of ATL's activist community. Vital also is profile data on role (teacher/lecturer/support), sector (maintained/independent) and phase (primary/secondary/sixth form/FE). This profile data is much more reliably held both for reps and the membership at large. Detailed mapping information of this profile information can be accessed by branch via the new My Branch Membership database, but it was also agreed that it should be proactively disseminated to branches on a termly basis and specifically included in the background information provided during the four-module programme of face-to-face training.'

Diversity profile action plan

Drawing practical conclusions from the equality profiling findings - given their anonymity, the lack of much comparable data for the membership at large, and the lack of any trend data - was difficult. Most importantly in terms of an action plan, the steering group recommended (subsequently agreed by executive committee) that the e-survey should be completed every two years, and that the next time it was run further consideration should be given to whether it could be widened to the membership at large.

Targeted communications strategy

Targeted member communications around role and sector were already established at the start of the project (including termly member newsletters to support staff, independent school, post-16 college, student and newly qualified and school leader members). Mark explains, 'During the

life of the project this communications strategy has been developed to include new targeted and branded rep e-bulletins, sent termly to reps in independent schools, academies, FE and sixth form colleges and maintained schools. These e-bulletin templates are currently used by staff only but we plan to roll them out for use by branches to target communications locally too.'

Mapping

The membership profiles of all those attending module 2 of the face-to-face training were mapped by role, sector and phase. These delegates were also provided with tools in the training to factor this membership and rep profiling into branch health checks and branch development planning, in order to engage all these groups of members more effectively in the activities of their branch.

Design and delivery of four training modules

Delivered in parallel with the gathering of reps' emails and the activist profiling exercise was the delivery regionally of four one-day face-to-face training modules to branch secretaries, thereby ensuring smaller groups and a greater focus on skills development. These were geared to equipping them with greater confidence, skills and understanding to boost their capacity to adapt to the changes in workplace structure and membership diversity and to overcome the modernisation bottlenecks. Mark points out:

'Previously, the union had only been able to disseminate training to this community via termly, national, one-day branch secretaries' meetings. These meetings also needed to disseminate vital pay, conditions and policy updates, scarcely leaving more than 90 minutes each time for workshop sessions in smaller groups. The format of these meetings was ill suited to either hands-on IT training, or to confidence-building skills training focused on bringing about a significant transformation of role and approach.'

The target was to deliver each module to 50% of current branch secretaries.

Module 1: My Branch Membership

database and bulk email - The focus of this module was new IT systems vital to the branch secretary community:

- **My Branch Membership database** – essentially an enhancement to the existing membership system, making it remotely accessible to staff and branch officers, thereby putting it at their fingertips: real-time membership status tracking; labels, lists and statistical reporting; facility to submit membership details updates and amendments. 'This system had been in place for some time prior to the project, but we had not been able to provide any face-to-face training on how to use it, and consequently it was not widely used by many branch officers.'
- **A bulk email system** - making it possible for branches to send regular emails to members and reps, targeted where appropriate, through a system that could track whether emails were opened and read, and also manage rejected or failed email to clean up members' email records.
- **My Branch report** – linked the two systems, providing the dataset of members' emails to which a bulk email is sent.
- **A bespoke ATL web portal** – used to access the two systems, ensuring appropriate virus and data protection.

The service provider of the membership system (Millers) developed the My Branch system and undertook vital work as external trainers, ensuring the system was structured appropriately for the training delivery, including the implementation of specific reporting requirements suggested by the project team - like monthly reports to welcome new members and new reps, bespoke reports for groups of members by membership type, role, sector and phase. ATL's own IT staff then designed the training module, developing a lengthy guidance handout that was provided as hard copy at the training. Separate guidance on

data protection was also included on the course.

The course was delivered on nine days across England; thereby ensuring attendance was sufficiently small on each day to facilitate hands-on training, with each attendee bringing along their ATL-provided laptop to the course.

Seventy-three branch officers attended module 1 of the training, representing 48% of the current branch secretaries and 56% of ATL branches. Although there were one or two technical IT issues at the first couple of training days, the feedback was overwhelmingly positive. The hands-on element was especially well-received. 'The additional evaluation undertaken at the end of the project (after module 4), reinforced the positive impact of module 1 on branch activities - more than seven in ten stating that their branch now checks member details via My Branch more regularly and one in three stating that their branch sends more member communications via email. On the other hand, it also emphasised the fact that many felt that they had not been able to follow up and refresh this training quickly enough, due to delays in sending the Learning CD.'

Module 2: Organising and branch development

The second module of training, delivered on four regional training days in the spring term 2009, shifted the emphasis from branch officers adopting new IT tools, onto the need for branches to recognise the urgency of renewal to arrest the declining health of many branches and to adopt a more strategic and focused approach to branch development. 'This was not a new message,' says Mark. 'It had been at the heart of the union's strategic priorities since at least 2003, championed across the union by its leadership since 2005, through a new Recruitment & Organisation department. But, like anything that involves doing new things and old things in different ways, it is a message that has always been difficult and challenging to convey.'

Delegates were given tools like a branch health check to help assess their organisational health, and a branch

development plan template to help branches think strategically about their renewal priorities. The course also provided attendees with a spreadsheet mapping their membership by subs category, job role, phase and sector and the reach of their workplace rep networks.

Consolidating the content of module one, this second module reminded people that real-time mapping information could be accessed via statistical reports in My Branch, and that targeted bulk email could be used regularly to welcome new members and reps. However, when making these links back to the first module, it did also highlight the ongoing need for those new IT skills to be refreshed, ideally via the Learning CD.

Sixty one branch officers attended module 2, representing 42% of current branch secretaries, and 17% down on attendance at the first module. 'The feedback from those who attended was generally positive, nonetheless reminding us of the very real obstacles to achieving this kind of cultural change, including facility time constraints, for instance. In particular, feedback was positive with regard to the specific tools disseminated on the module. The reach of this module was increased afterwards by disseminating the tools by email to all branch secretaries.

This wider dissemination was followed up via a workshop session at the Summer 2009 branch secretaries' meeting, attended by a further 15 branches, and also via organiser support with specific branches that encourages the branch committee to undertake the health check and complete the branch development plan. This led directly to some examples of best practice that could be subsequently disseminated on module 4. Mark adds: 'In light of the focus in this module on branch development planning, and specifically on prioritising activities to identify new reps, it was especially gratifying that the additional end-of-project evaluation identified that more than half of those who attended said they felt more confident to undertake branch health checks and development plans, and that their branches now undertake more time and resources to targeting workplaces

without a rep. A third of those who attended said their branch welcomed new members and reps more systematically and undertook more membership mapping.'

Module 3: Improving branch communications - websites and newsletters

Module 3, delivered at nine regional days during the summer term 2009, returned the emphasis to equipping branch officers with skills and confidence to enable them to use new software and systems – in this case using branch website templates to design and publish their bespoke branch websites. A considerable amount of systems development was undertaken before the course itself to establish the branch website structure and to populate each website with a minimum of local information, work undertaken jointly by ATL's IT and communications staff.

Like all the training modules, although the emphasis was on learning how to publish a branch website on a particular software template and platform, the module put this in a wider communications context. Specifically, the course also disseminated new brand and style guidelines that applied to hard copy branch newsletters as well as branch websites. Branches were encouraged to think about how exactly branch websites could complement (rather than be a substitute for) a multi-faceted communications strategy that would also include member meetings, printed newsletters and targeted email.

Sixty-six branch officers attended module 3, representing 45% of current branch secretaries and 51% of branches. Branches were encouraged to consider whether this was a role that might be undertaken by someone else on the branch committee, perhaps with more specialist website/IT expertise, and a small number of branches were represented by someone other than their branch secretary. Once again, the hands-on nature of the training (each attendee worked through tasks on their own laptop) was very positively received. Many branches had been waiting for the template and the training for some time in order to publish more information to their branch websites. Many of those who attended left

the training having published a new branch website on the day; many others did so shortly afterwards. Of those completing the end-of-project evaluation form more than four in ten said their branches undertook more promotional activity via branch website or email and a quarter said their branch published more branch news via their branch website.

Module 4: Branch action planning

Delivered during the autumn term 2009, the final module sought to reinforce and link together the key learning points from each of the previous three modules. After useful guidance from the steering group, a two-part format was settled upon: an IT-rich session in the morning on how to produce e-surveys; and an action planning session in the afternoon seeking to reinforce the planning and development tools disseminated in module 2, as a vehicle for demonstrating how all the module elements could link up to make branch activities more effective.

The e-survey session focused on a particular open source tool called Survey Monkey, already widely used by staff to conduct member surveys and which many branches were keen to adopt to take forward their membership mapping, engagement and communication activities. Mark adds: 'As the initial project budget had not envisaged this module having a significant IT component, it was not cost effective to run sufficient sessions to make it as IT hands on as modules 1 and 3. However, a fifth (Saturday) session was added and laptops were centrally provided so that those attending could work in groups of two or three.'

The e-survey session started out with a consideration of the role of surveys, permitting that element to be related back to the wider goals of the four-module training, such as engaging members, targeting communications, and identifying member concerns. The afternoon session disseminated some examples of the branch planning best practice developed by organisers working with branches since module 2 had delivered the templates for this activity.

Sixty-seven branch secretaries attended module 4, representing 45% of current branch secretaries and 52% of ATL branches. The e-survey session was especially well received, confirmed by the end-of-project evaluations, which identified that a third of branches who attended now undertake more member e-surveys. Also, many commented that the course helped them to understand the inter-relationship between the four modules. As with each of the previous sessions, the feedback registered the importance of ongoing refresher and follow-up training.

Learning CDs

From the outset the project identified e-learning – and CDs/DVDs in particular – as a vital means both to extend the reach of the training beyond those who could attend the face-to-face training, and to consolidate and refresh the training of those who did attend, especially for IT systems that are continuously upgraded and enhanced. At its very first meeting, the steering group had identified the potential benefits of the Learning CDs to the IT components of the training programme in particular, and accordingly asked the project team to explore the possibility of producing such learning tools for both module 1 and module 3. The project team achieved this, disseminating to all current branch secretaries the first Learning CD (Branch Websites) at the end of December 2009, and a second Learning CD (My Branch and Bulk Email) in March 2010.

Impact

Two years on, the project has had a measurable and positive impact:

- ATL now has 69% of reps' email addresses - a step-change 55% increase. The steering group has continued to oversee progress on this measure, encouraging capture of reps' email addresses at all levels of the organisation, including by branches themselves via the My Branch Membership database that they can access remotely.
- There is now reliable equality and diversity data – gender, race, ethnicity, age, sexuality, faith and

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disability – for 20% of the rep and branch officer community, and ATL are committed to repeating a diversity e-survey every two years.

- They have delivered four modules of face-to-face training to branch officers, reaching no less than four in ten current branch secretaries each time, with 98 branch secretaries (almost two in three current branch secretaries) attending at least one training module, and 68% of those attending describing the modules as very useful.
- Course materials (activities, handouts, tutor notes) have been developed for each of the four modules, including two Learning CDs for the two modules related to My Branch Membership, eTelligent and branch website IT systems, all ready to be rolled out to new branch secretaries as they take up their posts. **'The two Learning CDs have already widened the exposure to the training to the whole community of branch secretaries and are a very material and concrete resource for future training – for instance, the learning software used also offers the possibility that the CD content can be made available via our web-portal, thereby offering real-time refresher training as systems are upgraded.'**
- ATL has increased the confidence of branch officers who attended the training to use new IT tools, with 74% more confident in using My Branch Membership, 60% more confident in using eTelligent bulk email and 55% more confident in updating their branch websites.
- New health check and branch development planning tools have been distributed to more than four in ten current branch secretaries who attended the training modules, and made a demonstrably positive impact on branch engagement with rep renewal activities, with 72% saying they now undertake more

targeting of workplaces without a rep.

- A detailed sustainability action plan is now in place to consolidate these achievements and the project steering group has been extended for at least another year to oversee the action plan's implementation on behalf of the national executive committee.

Benefits

Best practice

A number of examples of best practice emerged during the course of the project:

- Self-organised, informal local learning networks have already emerged in the Midlands, West Yorkshire and the North West, through which branch secretaries have got together in their own time to develop their skills from the IT modules, often with the more confident among them acting as learning mentors to less confident colleagues.
- Delivery of Excellent Branches training regionally for four terms successively, ending in autumn 2009 **'certainly appears to have achieved a step-change in communities' willingness to engage with regional training generally, evidenced by high attendance of branch officers at new regional casework training days in March 2010'.**
- A number of branches report that they now regularly send out sector news received from the London office in targeted sector e-bulletins to their members.
- A number of branches now proactively request updated membership mapping data to inform ongoing health-check and renewal activities.
- Organisers report that branches are more engaged in their national initiative to target workplaces without a project, actively participating in

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- User-friendly branch development planning templates have emerged from the joint organiser/branch officer work on branch development, for instance in London.
- Some branch secretaries, without organiser support, have proactively completed the health check and development planning with their whole branch committee (for example, Lancashire).

Says Mark:

'Developing these examples into case studies that can be shared more widely within the ATL branch community, and with BIS support, perhaps beyond ATL, will be an early priority for the steering group, and was specifically reflected in the sustainability action plan it recommended to the ATL executive committee that in May 2010.'

Sustainability

Throughout, the steering group always focused on how to ensure that the achievements of the project could be embedded in the ongoing activities of the union. From the outset, the project aimed to deliver certain material and cultural legacies, which have included:

- training course materials that could be updated to roll-out further induction and refresher training
- Learning CDs and other e-learning tools that could provide a cost-effective mechanism to deliver future training
- new targeted communication strategies to engage the full diversity of ATL members, in particular workplace reps, more cost effectively
- a renewed commitment among branch secretaries to attend and value training
- an increased willingness among branches to adopt new systems and new ways of working to meet the challenges of changed and changing circumstances

- a more complete understanding of the diversity of the union's active membership and how to engage all members most effectively
- examples of best practice to disseminate more widely
- active members who could act as peer-to-peer champions for a continued focus on overcoming modernisation bottlenecks.

Lessons learned

The following lessons were identified:

- **Plan your governance structure** - The governance structure worked well, helping to ensure: (i) a common understanding of the project objectives, outcomes and deadlines amongst staff across a number of departments; (ii) regular 'user group' input and support from the active member community; (iii) a sustained focus by all stakeholders on project delivery; and (iv) a shared approach to problem solving **when 'the inevitable obstacles'** arose.
- **Be flexible** - There were considerable delays to the CD element of the project, arising initially from the demise (the company went out of business) of the external consultants who were initially envisaged as sourcing this work, and subsequently from the staffing and work bottlenecks that arose from bringing the development work in-house. These delays were agreed with BIS, who provided valuable guidance on how ATL could keep this element on track. Latterly BIS agreed a project deadline extension from end of November 2009 to end of January 2010, which enabled the development of both Learning CDs to be completed, with ATL staff costs covered by UMF finance originally allocated to the external consultants' costs and software license costs. (Rather than using the external consultants' proprietary software platform - one for which ATL had

already paid the license fees was used.)

- **Ensure trained support -** Reflecting on the above weakness in the project delivery, the steering group also identified the fact that, at the time this training was delivered in 2008, the IT helpdesk had not itself been trained on either system, so was also hampered in terms of providing support to those who struggled after the training to remember how to undertake tasks learned on the course; a weakness that has now been corrected. The IT department will now ensure that their helpdesk is trained in any new system before it is implemented for branches.
- **Coordinate elements -** Although the project exceeded expectations in terms of producing two Learning CDs rather than just one (as initially envisaged), it fell some way short of expectations in that the Learning CDs were not available at the same time, or even shortly after, the delivery of the face-to-face training. **'The feedback from course participants makes it clear that these delays compromised the longer-term 'stickiness' of the face-to-face training. It is likely that we will have to do more face-to-face training to consolidate and preserve this learning, even among those who attended, rather than being able to rely exclusively on the Learning CDs.'**

Looking ahead

- The steering group is championing the continued focus of the union on this area of work, and will continue in place for at least another twelve months to oversee a detailed sustainability action plan, including informing budget setting for 2011
- Actions for a more targeted equalities communications strategy may follow the next survey (in autumn 2010).

- The Learning CDs have not yet been available for long enough, nor used by sufficient people for there to be a proper evaluation of their intrinsic value as a learning tool. Preliminary feedback, however, is that their value will be as a complement to other training, rather than a substitute. Full evaluation of the Learning CDs will be an important priority for the steering group's sustainability action plan for the next twelve months.
- Relatively few branches have regularly updated their branch websites locally, and the course feedback for module 3 reflected on their need to refresh the skills via use or follow-on training. The Learning CD for this module was sent out in December 2009, six months after many of them attended the course, and when people completed the end-of-project evaluation in early February 2010, over half said that they had not yet had the chance to use the CD. As with the first module, identifying ways to provide refresher and follow-on training on these skills will be a vital element in securing sustainability.

Conclusions

Mark sums up:

'So - from a branded training folder containing four modules of training course materials and two Learning CDs to the equalities data we have gathered on reps for the first time, from new templates for targeted e-bulletins and branch websites to the increased use of surveys to engage members, from the increased engagement from branches in the work to identify and support more workplace reps to the branch secretaries' new thirst for training and support, ATL's Excellent Branches UMF project has very significantly advanced the union's ongoing modernisation strategy. Crucially, it has established the steering group as a champion to consolidate this work over the coming year, to ensure the gains achieved by the project are built upon

and extended. Perhaps most importantly, the steering group itself has become an active champion in the union to maintain our focus, including, if necessary, making the case for switching or committing extra resources.'

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