

**UNION MODERNISATION FUND –  
ROUND 2**

**GMB - Developing our management  
structures**

**Case Study written by : GMB**

**DECEMBER 2010**

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# GMB UMF2

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'Developing our  
management  
structures'

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Harry Donaldson

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## Executive Summary

The GMB were very honest in the appraisal of the situation that led to the submission for grant funding for this project. The Union has been committed to changing the way it approaches its business over the last five years but has perhaps done so without enough consideration of the management structures needed to deliver on those changes. This project was devised as recognition of organisational management weakness and a level of distrust following a difficult period of organisational change and some years of poor strategic management. There existed both cultural and perceptual barriers in the organisation that at best prevented full realisation of strategies and at worst caused distrust. This project has been designed to provide a catalyst for implementing professional management throughout the organisation from the SMT downwards.

" The most important issue to emerge from this project was that it forced us to examine our shortcomings and to look at ourselves in an honest and critical way. From this we emerged with the confidence to change, challenge and confront the difficult problems we had avoided facing up to for years as a union"

Paul Kenney

" Despite some initial scepticism over this project's implimentation we have managed to embed the behavioural and cultural change we needed to bring about. The transformation from managing decline to managing our future and anchoring change into our DNA."

Harry Donaldson

The benefits of this project would be to facilitate management throughout the organisation and development of an open culture at all levels. The table below details the benefits realised through this project;

Issue/Need	How it was addressed	Benefit
New Senior Management Team (SMT) relatively untested	Teambuilding through comprehensive management training	Strong SMT working coherently towards an agreed common purpose – illustrated in implementation of review process through action plans
Difficult history of performance management in the Union	Addressed through frank discussion during training of SMT and workshops during roll out of training	Issue not fully resolved, managers not fully confident in their role. Consistent application of disciplinary procedure across the Union is required. Project has highlighted this and the SMT

Issue/Need	How it was addressed	Benefit
		are addressing
Ad hoc people management	Training and subsequent action planning	Action plans established a common approach to setting individual work plans linked to strategic priorities with regular review processes or one to ones
Ad hoc implementation of strategic objectives	Team building and clear targets derived from strategic plans	Team building has produced a united leadership of the organisation with a common goal, application across the Union using management tier is a perceived long term benefit. SMT need to embed through continually revisiting and focusing action plans on strategy
Mistrust between SMT and management tier	Open consultation and conversation conducted through the project	Project facilitated an open conversation that invited the management team to see themselves as part of the decision making structure of the Union in return for the responsibility of management. Beginning to break barriers and establish new open culture and climate of communications.
Resistance to management idea	Accessible training linked to day to day experience of individuals and action planning	Management concepts introduced and partially embedded through action planning and review process established through the project.

### Success of the project against aims and objectives

Reviewing the specific aims and objectives of the project the Union has performed reasonably well the table below expanded on how each of objectives were achieved.

Objectives	Outcomes
Delivery of a comprehensive programme of training and development for the Senior Management Team (fourteen members) which will include management skills and team development	A comprehensive programme was delivered to the Senior Management Team over seven days in early 2009. The sessions included; <ol style="list-style-type: none"> <li>1. Strategy</li> <li>2. Teambuilding</li> <li>3. Performance Management</li> <li>4. Leadership and Management</li> </ol>

Objectives	Outcomes
	<p>Techniques</p> <p>5. Planning sessions</p> <p>The programme formed the basis for the roll out of training to the next tier of management. The session precipitated a breakthrough in a relatively new team that focused as far as possible on action planning the Unions activities in line with strategic direction.</p>
<p>Facilitated Team development modules delivered to identified teams in nine regions, head office and the National Administration Unit (approximately 60 employees)</p>	<p>Six sessions were delivered over the course of summer 2009 to 59 members of the management tier of the organisation. It introduced management concepts including;</p> <ol style="list-style-type: none"> <li>1. Leadership</li> <li>2. Team Management</li> <li>3. Managing change</li> <li>4. Communication</li> </ol> <p>Underpinning the content was an exploration of what GMB@Work meant for their management role. The modules were also used as part of a wider piece of work to link the management tier into the decision making structures of the professional Union. As part of the project the SMT engaged and consulted the management tier in a conversation at Scalby and Edgbaston about their position in the organisation. Taken together they removed the perceptual barriers that existed and placed a level of responsibility on officers and management staff to fulfil the management role. This has been central in changing aspects of the internal culture of the Union that led to the need for the UMF bid in the first instance. The internal narrative has begun to change on the basis of this exercise and has moved the organisation on to a different trajectory.</p>
<p>Identification of SMART objectives for the identified teams in the nine regions, head office and the NAU with action plans for achievement</p>	<p>Teams have submitted an Action Plan based on the strategic development plan of the Union 'A Framework for the Future of the GMB' and a set of recommendations following an internal project report on the team development modules.</p> <p>Recommendations included;</p> <ol style="list-style-type: none"> <li>1. Staff inclusion</li> <li>2. Clear disciplinary/performance management protocols</li> <li>3. Staff and officer capability</li> <li>4. Management development plan</li> </ol> <p>Teams have on the whole committed firmly to the principle of action plans linked to the</p>

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Objectives	Outcomes
	strategic goals of the organisation with individual and team targets flowing from there. There has also been a commitment to reviewing performance and providing developmental opportunities. The action plans represent a common commitment and method to planning the work of the Union that will need to be further embedded by the SMT. The action plans fail in some areas, they are not specific in their identification of training and development needs; they are not clear on performance management and disciplinary procedures. Recommendations have been made to the SMT on this.
A strategic and consistent development plan for the union	The Union has formalised 'A Framework for the Future of the GMB' as the strategic document for the Union. Through its presentation to Congress each year the Union are able to set national, regional and team targets from it. The management capability, structures and awareness derived from this project will facilitate its future application and realisation.
A reduction in the number of internal grievances raised by employees in the year after completion of the project. Our target is a 20% reduction over the number raised in the previous two years	This will be reviewed in September 2010 following a year since the closure of the project.

### Lessons learnt

There have been a number of important lessons learnt through the experience of this year long project

1. Dealing with organisational culture – change programmes impact on organisational culture and produce reactions that can be difficult to manage. Many of the issues that the project was trying to address resulted from reactions to SMT change programmes over the last five years. Recognising organisational culture and developing ways to mitigate the impact of change for people is as important as the benefits of change itself. The project illuminated this as an issue through retrospectively addressing some of the impacts of previous change programmes. Engaging managers and transferring ownership to them as change agents is an important step forward and a key project learning point.
2. Reliance on assumptions – working on commonly held assumptions can reinforce poor or negative practice. Through the facilitated sessions the SMT were able to quantify some of the problems that they 'thought' they were facing. By identifying the real scale of some problems those perceptual barriers were removed and the action that was open to the SMT, and the thinking that could take place, was much greater.

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Challenging assumptions is an important strategic role that the SMT needs to encourage and is now more able to having experienced a breakthrough during the life of this project.

3. The benefit of openness – the Union has had a tradition of closed off communications between different levels in the hierarchy in the organisation and most damagingly between regions. The project illustrated a way of working that was open and cooperative both horizontally and vertically. The open meetings, consultation and conversations with the management tier of the organisation have borne fruit through acceptance of management function and a reassessment of the role of the management tier in the organisation. The openness in itself is difficult to measure but the structures and principles established through the action plans provide a formal and regular venue for feedback to the SMT.
4. Importance of consistency – throughout the discussion with the management tier and during the facilitated training sessions with them a recurrent and divisive theme was the divergence in management roles across different parts of the federal organisation. Conversations were most difficult on performance management and disciplinary procedures with a lack of consistency leading to confusion over what the expectation on individuals was. The lack of consistency introduced doubts about the level of trust, responsibility and authority of certain members of the SMT. As a group of professionals with the same job role within the organisation there is a need to develop consistency and standards in order to ensure equality of opportunity across the organisation. This issue is being addressed and an action is on the SMT to maintain this momentum as part of the projects legacy.
5. Project management processes - Internal and external issues impacted on the smooth running of the project to an extent that an extension was required. The lack of appropriate identification of the risks and the lack of immediate restorative action led to a significant period of inactivity on the project. This was compounded through poor reporting to BERR/BIS throughout the life of the project. Better systems in place for monitoring and evaluating the project progress would have led to an easier passage to completion. Applying some of the theory contained in the project would have addressed some of the issues that impacted on the project.

## **1. Introduction**



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This report refers to the Union Modernisation Fund (UMF) project 'Developing modern management methods in the GMB'. The report will refer to the activities that have been undertaken in the course of the project from September 2008 to September 2009. It will further refer to the outputs and outcomes of those activities. The report will identify learning points from the project, recommendations for future action, and evaluate the project's impact on the Union. The purpose of the report is to act as a record for the department of Business Innovation and Skills and to provide the basis for a case study to be disseminated across the trade union movement.

## 2. Background

The former department of Business Enterprise and Regulatory Reform (BERR) approved the GMB's application for a UMF grant in late 2007. The fund is designed to assist independent trade unions in modernising for the challenges of the 21<sup>st</sup> century labour market;

*"It provides financial assistance to independent trade unions and their federations in support of innovative projects, which contribute to, or explore the potential for, a transformational change in the organisational effectiveness or efficiency of a union - in the light of the changing needs, aspirations and behaviour of workers and employers in the changing UK labour market.*

*By funding innovative modernisation projects, the UMF seeks to enhance the ability of trade unions to make a full and effective contribution to constructive employment relations and to the economy as a whole.....*

*.....Case studies will be published on UMF projects as they complete. The aim is to share the good practice on offer with other unions who are encouraged to consider what they can learn from the experience of their colleagues."*

The submission from the GMB focused on improving internal management structures.

The GMB is a Union with a long and great tradition; nevertheless the general decline in trade union membership along with internal issues put it in a fairly weak position at the start of the 21<sup>st</sup> century. In fact the Union faced the possibility of ceasing to exist as an independent entity within the last 5-10 years. In order to fully face that situation the Union put together a survival strategy to remain in existence as opposed to merging with other trade union bodies. The Union did survive, but in order to flourish there was a need to change the way that the Union operated, where the Unions energy were focused and how it interacted with members. A change programme was instigated through a document submitted to congress a 'Framework for the Future of the GMB (2005)'.

Any major programme of change needs to be actively managed, within an organisation, in order to become embedded and accepted. The programme of

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change that was successfully attempted continues as the GMB@Work strategy. That change programme was in itself significant enough to destabilise employees leading to deterioration in work practices and employee relations in certain areas of the Union. Two reasons for that impact were the lack of embedded management structures within the Union to manage the change appropriately and secondly a closed culture that bred distrust of new initiatives. A difficult consequence of this period was a number of tribunals and individual grievances raised by staff as the change programme challenged and disrupted the status quo.

There has traditionally been a lack of modern management within Trade Unions and a certain amount of resistance to it and the concepts associated with it. Management represented an adversary to trade unionists, a body attempting to resist workers rights, their advancement and their improvement. That perception is dying out but the legacy of that culture is still being felt. The GMB recognise that good management across the organisation is the way to achieve our goals and importantly to ensure that our people are treated well. Being aware of that culture legacy gives some context as to why this project needed to take place. In addition to this there is an internal legacy of non cooperation across regions and federal structures. The GMB is the first to admit that the federal structure has in the past put up a number of barriers to achieving a collective national approach to our own internal organisation, methods and work practices. A certain level of protectionism and distrust was for a long time inherent in the Union – the legacy of that is a lack of common approach to important issues such as management. The leadership of the Union in the form of the Senior Management Team are working to reduce the impact of that legacy and open up a future of mutual cooperation. This project is again a way of addressing some of those established legacies and moving the Union forward.

The challenge for this project has been to provide the catalyst and a further fuel to those changes that are already underway. Specifically it is about embedding good management processes and providing coherence for employees in management processes. The project was designed to address these issues from the top down with a programme of training and development for senior and middle managers in the organisation. This would be underpinned by the establishment of a number of internal processes that support good management. The key objectives for the project were;

1. Delivery of a comprehensive programme of training and development for the Senior Management Team, including management skills and team development
2. Facilitated Team development modules delivered to identified teams in nine regions, head office and national administration unit
3. Identification of SMART objectives for the identified teams in the nine regions, head office and NAU with action plans for achievement
4. A review process established for each of the nine regions, head office and the NAU
5. A strategic and consistent development plan for the union

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6. A reduction in the number of internal grievances raised by employees in the year after completion of the project. Our target is a 20% reduction over the number of grievances raised in the previous two years.

In order to deliver and achieve the project objectives the Union appointed an internal project manager, Harry Donaldson, to lead a project team. In the bid the project team was to consist of project manager, DGS, and two other regional secretaries. Internally there were a number of personnel changes, including the departure of the Deputy General Secretary, this impacted on the project start date and also the balance of the project team. Given the scope of the project it was felt that there was a necessity to give the project team the appropriate weight to emphasise the projects importance for the Union. The project team was recast to include a number of regional secretaries and the finance director. The reality of this meant that a significant cohort of the SMT were involved in steering and delivering the project, giving the outcomes a powerful legitimacy.

#### Project Team

Name	Position
Harry Donaldson (project manager)	Regional Secretary Scotland
Allan Garley	Regional Secretary South West
Andy Worth	Regional Secretary Midlands and East Coast
Richard Ascough	Regional Secretary Southern
Tim Roache	Regional Secretary Yorkshire and North Derbyshire
Allan Wylie	Director of Finance

### **3. Delivery of comprehensive training programme for the SMT**

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### **3.1 Journey**

The GMB are currently on a journey that has led to a new and prosperous outlook for the Union in the early 21<sup>st</sup> century. The 'Framework for the Future of the GMB' document is revisited formally every year at congress but in reality it is constantly changing, updating and moving forward in a positive direction. That is in stark contrast to the late 20<sup>th</sup> century and the first years of this century where the Union could have been described as being in disarray. Awareness and recognition of that state led to the changes that were required, focusing the Union on retention, better organisation and internal measurement. The leadership of the Union galvanised themselves as a first step in implementing the change. This has taken the form of the Senior Management Team, formed of nine Regional Secretaries, the General Secretary and representatives from the NAU and the National Office. In principal this is a standard organisational construct, however, this was relatively a revolutionary concept within the federal GMB when it was formed in 2007.

To understand why this was such a novel concept it is important to understand the culture that needed to change. The Union is a federal organisation with a proud tradition of equality for the federal arms of the organisation. At its best the federal system gives an equal voice to regions and members in the decision making processes of the Union. It is fair to say that over the course of a number of years the federal system was not working at its best but rather creating a climate of suspicion and secrecy. This climate meant that applying common principles, sharing information, exchanging best practice and generally working together could be a difficult thing to achieve. Moving on from that culture has been important, achieving the clarity and commitment in leadership from the top of the organisation has been a crucial step in achieving this. It is in this context that 'Developing modern management methods in the GMB' was conceived and existed. The project represented an opportunity to introduce concepts, practice and support on a standard basis across the organisation, to achieve specific outcomes, but also to assist the Union in moving further along the road towards a better organisational culture.

Part of the realisation has been that our senior officers cannot be expected to manage the achievement of the organisations goals and to successfully manage the people that are delivering day in day out without structural support.

The management function has existed in the Union for a number of years in the job descriptions and organisational charts that relate to our senior officers and members of staff. The reality, as in any organisation, is one of interpretation and application. There is a traditional inherent lack of consistency in approach across the board in the Union that stems from a fiercely defended regional autonomy within the federal structure. This applies to management methods as it does too much else in the organisation. The federal nature of the Union is a source of strength but in the past it has been applied in a negative way that has prevented good practices and positive experiences from being shared across the Union. Exceptional management practice could exist in neighbouring regions but communication channels and trust did not exist to allow such practice to permeate.

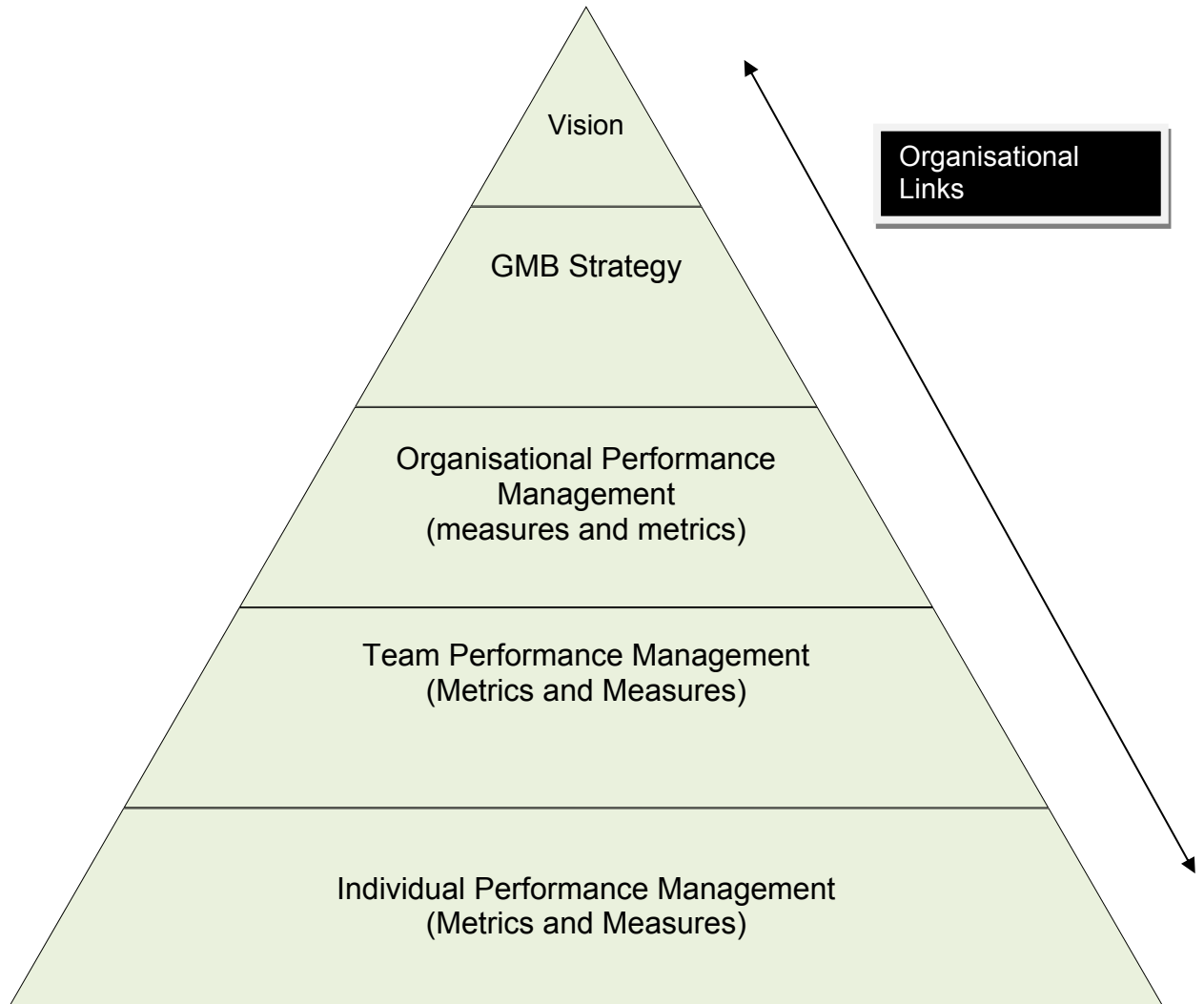
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The Union is moving in the right direction but it is a difficult journey, the experience of this project has been one of continuing growth in the ability of the Union to think strategically and to commit to the concept of management. Nevertheless it has at times been an extremely fraught process that has encompassed the cultural legacies previously mentioned, making progress at times seem not only difficult but also unlikely. For all the difficulties the Union is in a strong position following this project; it has undoubtedly bonded the SMT together; established a direct conversation with the senior officers and managers in the organisation; and provided the basis for strong structural management tools through action planning and review processes.

### **3.2 What we did**

The project design and method is based on a principle of establishing a vision at the top of the organisation, translating it into a strategy for its achievement which is then broken into a set of goals with measurable targets. This is applied logically across the organisation with managers working with individual members of staff to link their personal role to the overall vision of the organisation, to meet targets and goals, achieve the strategy and realise the vision (see Fig 3.2.1). In order to achieve the vision of the organisation it is necessary to have capable managers at every level in order to successfully manage and direct the resources of the organisation. This is a very broad overview of the concept that underlies the project. The order and coherence that is explicit in such a rationale model is brought about by management processes such as action plans and reviews. It is further supported by increasing the capability of personnel to deliver such processes and to manage individuals. The project itself represents a structured but essentially iterative process to apply the model to the GMB, a large and organic organisation.

Fig 3.2.1



### 3.2.1 Two days facilitated strategy

One of the first project decisions was to reconfigure the Senior Management Training elements as described in the bid documentation. There was to be a three day training session at a management school followed by a two day team building session. This was amended with the SMT attending a facilitated session to explore organisational issues, focus on strategy development before identifying the training needs of the SMT. It was also an opportunity to attempt some level of team building and issue exploration in a safe environment. The two day session fits into the overall project activity as set out in fig (3.3.1)

Fig 3.2.1.1



The event took place in January 2009 at the Thistle Hotel in Euston, London. The agenda was put together with input from the project team and was facilitated by The Campaign Company (TCC). The two days were a mixture of understanding the organisation, team building and strategy all within the context of wider changes in the Union and the UMF project. The day was structured to;

1. Explore the dynamics of the team
2. Identify the training needs of the SMT
3. Produce a set of recommendations for a five day SMT training session

### 3.2.2 Vision and GMB strategy

The first element of the two days was an overview and a prelude to establishing a clear strategy. The document closest to a strategy at that time was 'A Framework for the Future of the GMB' an evolving congress document from 2005 that outlined a number of areas that the organisation identified for improvement. This document is now revisited every year at Congress; it is updated annually and forms the basis of a developmental plan for the Union. Contained within that document are a set of principles relating to how the Union organises, how it goes about its core business of recruiting and retaining members. This set of principles underpinned a route map out of a crisis that the Union experienced pre 2005. The crisis was the very real threat of amalgamation; merger or bankruptcy. The set of principles are known as 'GMB@Work' (Appendix One) and recalls traditional trade union values in a modern

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setting. The concept and the 'strategy' are rightly held in high regard as the way that the Union successfully reversed its fortunes; achieving financial stability and recording a growth in membership in every month for 18 months throughout 2008/09. It is a very practical route map that is used to continually secure the Union's future; from it is derived a number of numerical targets for the Union to achieve each quarter and each year around membership growth/retention. These targets are disaggregated to regional targets with monthly, quarterly and yearly targets for membership growth/consolidation.

As part of the strategy session the facilitators wanted to test whether the strategy was sound and performing the role of providing the vision for the organisation. The contention of the facilitators was that the Union has survived, it has grown, where does the Union want to go next and does there need to be a new strategy or route map? This was particularly aimed at linking growth targets to individual targets, how can the Union dramatise the role of individuals in this growth and sustainability strategy, was there a strong enough current vision behind it? In order to explore this with the SMT the facilitators held a session to stimulate discussion around organisational vision and culture and how it linked into the strategic documents of the Union. The SMT were asked to respond to the following question.

*'Was GMB@Work a strategy for the future or for the present? Did it need to be updated and moved forward?'*

The SMT held a defensive line on GMB@Work, this was expected given the predominance that the strategy has had in securing the viability of the Union in the past five years. It proved a fruitless discussion in the context of the strategy sessions but was important in moving that discussion on to the agenda. There was an unwillingness to have the debate in the first two day session, this was important and revealing for the facilitators. The SMT were responsible for immense organisational changes to the Union that have put it in the best of health from a difficult position less than a decade ago. The SMT have overcome massive obstacles and resistance in implementing a change programme, the initial and logical reaction to a 'challenge' to the underpinning strategy of this programme had to be resistance. There were boundaries that existed in this first session with the SMT that were substantial. As a team they had only existed for a little over a year and previous incarnations of their meetings were not the cooperative group that now met. This was a team working together on a common cause – something that GMB@Work clearly represented. In order to work with this team there was a need to understand the history and appreciate the sensitivity of approach required. Whilst the session was not able to have the frank discussion at this stage it would prove a vital piece of preparatory work for future sessions that would move the conception of the strategy and vision further on.

### **3.2.3 Organisational culture**

The starting point for this project was an understanding that a key element missing from the organisation was a culture of management. This lack of management



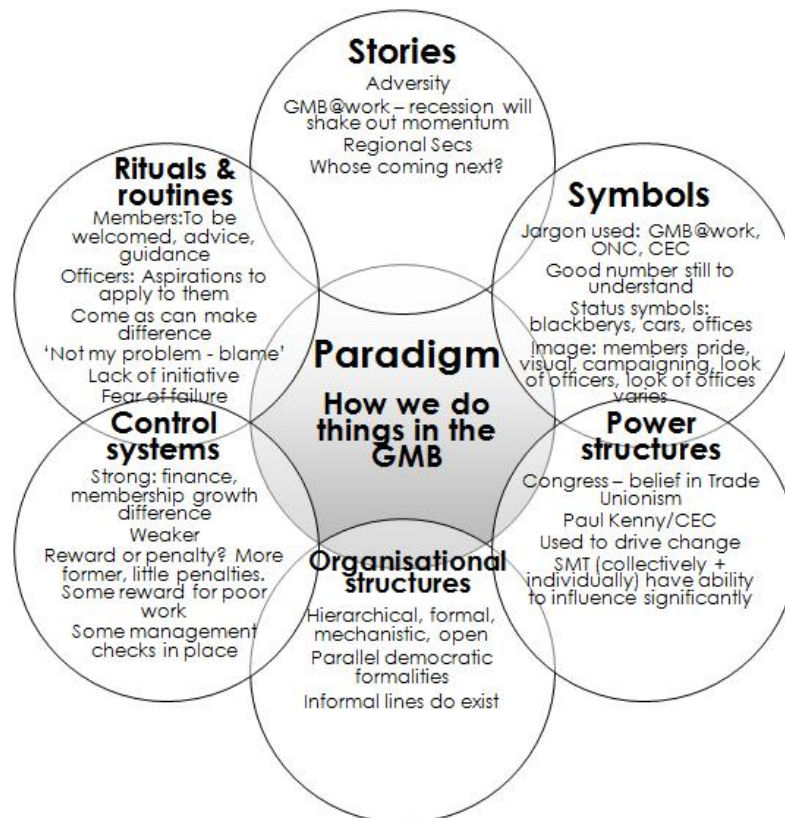
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culture was exacerbated and brought into stark focus as the organisation went through a number of difficult (and painful) changes in order to survive and (now) flourish. The impact of lack of management was widespread discontent as clarity and coherence were lost, communications misinterpreted, and entrenched positions reinforced rather than challenged. The ensuing grievances and tribunals were as a symptom of a large scale change programme implemented with ad hoc and inconsistent management structures with a relatively closed communication culture. In the days prior to the two day event we invited the SMT to identify the challenges that the Union faced through a short e-survey. The issues that were raised included;

- Modernising and effecting change, motivating staff to accept cultural and technological changes.
- Lack of adequate or efficient training in management skills and techniques.
- Lack of appraisal
- Maintaining growth and focus
- Implementing GMB@WORK
- Modernising policies and procedures

Using this as the start of a conversation the SMT were asked to identify the cultural issues that had caused them problems during their change programme and how they might be challenged or overcome in the future. To do this a session was facilitated with the SMT using the 'cultural web' a tool designed to map organisational culture. The tool was a starting point to open up a discussion about the major issues in the organisation. The first exercise as a facilitated group discussion was to identify the current cultural web the following diagram fig. 3.2.3.1 was created in live time;

Fig 3.2.3.1



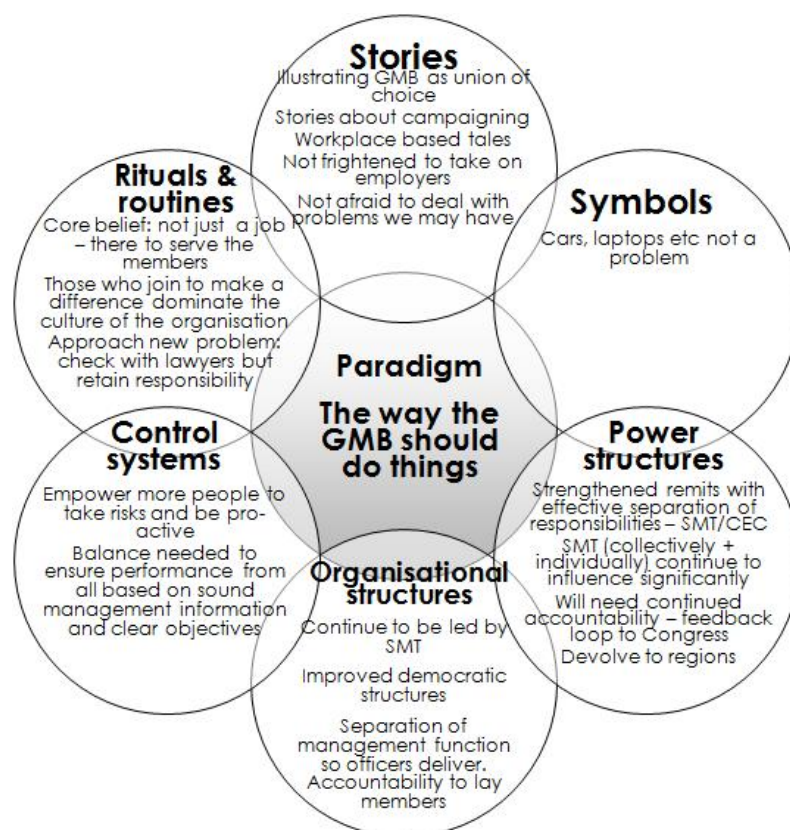
The session was designed to identify and stimulate an open discussion of the issues in the organisation that led to and stimulated the bid for UMF funding. In the bid there was a clear critique of the internal culture and structure of the GMB with an understanding of how to address those issues through management practice. Yet during this discussion and facilitated session the level of critique was minimal and to some extent stifled. There was a clear example of a group dynamic at work – individually the participants could critique the organisation in the pre work for the session (short e-survey) but there was a barrier or perceived lack of permission amongst equals to critique the Union fully. This exercise hinted at some developmental issues for the SMT; the SMT had been working together for just over a year the boundaries of the team were still being established and the roles had not been fully developed. This was a common position for a new team and was to be particularly expected in a federal organisation such as the GMB. There would need to be further development in order to allow the free exchange in the discussions that would be necessary in the course of the project. The initial two day sessions allowed the team to begin to push the boundaries that existed and also begin to confront the wider issues facing it.

An illustration of this is the second part of the cultural web exercise, to identify the desirable cultural web, as a group the SMT were able to articulate a more coherent vision of what the Union should be. It displays an understanding of the management needs and implicitly suggests that there is a lack of these currently in the

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organisation, yet there was a clear resistance to articulate this critique around the table. See fig. 3.2.3.2 below;

Fig.3.2.3. 2



### 3.2.4 Training needs analysis (appendix two)

One of the outcomes from this session was an understanding of the training needs of the SMT. The training needs analysis tool was adapted from a template to fit the skills and competency areas of the SMT; it reflects team training needs as well as relative levels of individuals training needs. The TNA had two purposes first of all to help identify the broad area of skills and behaviours that needed to be bolstered by the follow on training; the second purpose was to test the level to which the SMT (a relatively new construct) understood its strengths and weaknesses as a group.

During the session the SMT were asked to instinctively identify the training needs for the team through a group exercise. The following issues were raised;

1. Dealing with performance issues
2. Time management
3. Leadership
4. Delegation
5. Managing change and modernisation

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The SMT were then asked to take time to complete a training needs analysis form, rating their own level of skill against a set of skills and a set of behaviours, attitudes and styles. These were then analysed and headline results delivered. The top five issues from the analysis are listed here.

Five developmental skill areas of the SMT

1. Performance appraisals planning, conducting and follow up for team and self
2. Training and developing of others, coaching and mentoring, assessing training needs
3. Delegation, identifying and agreeing tasks, measuring follow up, management by objectives
4. Planning, prioritising and organising tasks and activities, time management, self and team
5. Quality awareness and managing, according to quality standards and procedures

Five developmental areas of behaviour, attitude and style

1. Prioritising, planning and organising the balance between work and home life
2. Coming up with recommendations and suggestions, more than asking for answers
3. Understanding the way people really feel, beyond what they seem to be saying
4. Managing upwards and sideways
5. Striving for new skills, knowledge and personal development

The results from the TNA reflected a high level of perception amongst the group and an awareness of how the group perceived itself. Having gone through some difficulties with the cultural and strategy sessions there was a clear set of emerging priorities identified in this session that would go on to inform the follow on training. The issue that the SMT identified for development on an individual and a group level in this TNA session corresponded; namely managing performance. There was a clear rationale for the issues identified in the original UMF bid documentation.

### **3.2.5 Conclusions and analysis**

The two day strategy session provided insight into a complex group of individuals within a complex organisation. There were a number of clear issues from the session that would inform the follow on training. It was clear from the outset that performance management and middle management were perceived issues for the group. They recognised the need to address these issues and it provided a clear recommendation for the next stage. There were further issues about bolstering the confidence and self belief of the SMT in what can be and has been a very challenging role for the individual members. There was also an implicit need to bottom out the issue of strategy, explicit reference to working on performance management and clarifying the middle management role in the organisation.

Additionally the session provoked thought on how to get the best out of this project for the group. The group dynamic made building trusting relationships with consultants important; challenging the groups approach and their understanding of issues was at times difficult in the first session. Theory was also a sticking point; the group are formed of practical people who achieve through doing. The reality of this for the follow on training was a clear steer away from theory and a greater concentration on practical skills to support the team in delivering. The group offered challenges to facilitators because of the relative newness of the team, there were a set of boundaries that had not yet been crossed but they were there to be challenged through the process.

### 3.3 Five day SMT training

Following the initial two day session with the SMT a decision was taken to recast the proposed training that had been planned. The project team looked at an alternative bespoke training package using consultants that largely knew and understood the trade union movement. The project team asked TCC to put together a package to be presented to the project team who would compare it with the originally planned management school exercise. The experience of the first two day session had brought a realisation to the project team that it would be very difficult for the SMT to work with unfamiliar consultants/academics and the TCC option was chosen. What TCC offered was an understanding of the trade union movement, an appreciation of the journey that the Union were on and access to expert consultancy services in the areas that the Union required assistance in. TCC's proposed a five day session with the SMT split into two sections; a three day session focussing on developmental issues for the SMT and a two day session to design and hone the application of the learning to the organisation.

Three day session	Two day session
Strategy	Managing change
Performance Management	Design of management training
Leadership and Personal Effectiveness	

#### 3.3.1 Days one to three

The initial Three day agenda is set out in the table below (table 1.). It was specifically designed to address the issues identified in the two day session as developmental challenges for the SMT. Tackling the underlying strategy issue was the natural starting point and would lead into the important middle day on performance management. This middle day dealt with a persistent SMT narrative that identified a cohort of officers and staff that were continually presenting with negative performance issues. A general aspiration amongst the SMT was a way to manage this performance issue with a positive outcome for individuals and for the performance of the Union. It references the management issue that stimulated the bid in the first place, a lack of management leading to grievance and negative

outcomes for both parties. The third day was about instilling confidence in leadership amongst the SMT, providing management techniques and skills to bolster the personal performance of the SMT members.

Table 3.3.1.1

Day	Session	Facilitator
Day 1	Strategy and vision (full day)	Neil Sharp – independent management consultant
Day 2	Performance management coaching (am)  Applying performance management coaching and other performance management techniques	Chris Harvey – independent performance management coach  Neil Sharp – independent management consultant
Day 3	Leadership and management techniques	David Evans and Jonathan Upton of the Campaign Company

### **Day one Strategy and vision (Neil Sharp)**

Outcomes for the day

1. Deeper knowledge on strategy
2. Cultural picture of the Union
3. Basis for further developing the strategy

Approaching strategy for a second time was necessary in bringing the principles of linking management directly to an SMT work plan for the Union to the fore. It was inevitably going to be a tough challenging one of the barriers of the initial two day head on but one that would establish the concept of strategy as central to encouraging modern management practices throughout the organisation.

The way into this difficult topic for the group was through a broad introduction to strategy using examples from trade union and other membership organisations as well as businesses particularly well known to the GMB. Using what might be termed competitors as examples of how an organisation can thread an overall vision of the organisation from the top to the bottom using strategy. A particularly emotive example being Walmart, owners of the supermarket chain ASDA with whom the trade union movement have had some issues;

*Walmart's vision 'to give ordinary folk the chance to afford the things rich folks have'*

This vision threads through to a strategy of low prices and low cost, that may lead to issues that trade unions would have a problem with as it translates to the benefits

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afforded or otherwise to employees of the organisation, but it nevertheless allows the organisation to shape its actions to achieve that vision.

This facilitated session stemming from the introduction to strategy formed an exploration of the Unions core purpose and through that process a framing of the vision the organisation is seeking to achieve. Through the course of the exercise the SMT were able to explore how this 'core purpose' permeates the organisation – or not. The discussion led on to where the current strategy is and how it is being communicated and implemented in the organisation. This practical and heavily facilitated session provided a foundation for a much deeper discussion about the Union and the way it achieves its vision. The slide (slide one) below is a summary of the approach that was taken in the exercise;

Slide one

The slide is titled "Developing the Culture Onion – 5 Stages, in order:" and features the SHARP logo in the top right corner. The logo consists of the word "SHARP" in a bold, yellow, sans-serif font, with a series of small white circles below it. The slide content is as follows:

- Develop the Core Purpose – What are GMB setting out to do? What is your reason for being? What is the focus internally that drives everything that we do?
- Develop the Core Values - The principles that guide the organisations along the way. They do not change. Core values require no external justification. They have intrinsic value. We hold to our values even when we are penalised for doing so.
- Understand your Role - The role GMB plays in the lives of your members when you fulfil your purpose?
- Understand and Agree your Personality – If GMB were Football Team, role Model or recognisable character, who would it be and why? What are the main personality traits of GMB which always shine through?
- Develop our external Culture – Our logos, the words we use, the way we talk to customers, the way we behave and the way we treat each other, our employment policies, our offices etc....

The concept of a core purpose began a debate about why being involved in trade unionism was important. It got into a fairly emotive discussion on the fundamental beliefs of the SMT. Through the exercise an articulate rationale for GMB@Work as the strategy for the Union was agreed upon.

*GMB@Work ensures the Union is growing, surviving and existing. It is providing the tools to organise Labour in the workplace and offers the protection of collective action through democratic means.*

The session was able to fully express the vision of the Union and identify GMB@Work as the strategy for achieving that vision. Not only could it be a rallying cry for the Union's survival but provide the tools with which to achieve the principle of organised Labour for the protection of the workers. Our initial contention in the first

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two day session was correct; that the strategy was underdeveloped, this session was key in developing it as a fuller strategy for the Union linked to an encompassing vision. Using GMB@Work as a strategy to achieve the vision, and actively weaving those dual elements through the organisation via coherent management structures would be the way to achieve the 'core purpose' that was reached. Picture one below shows some of the facilitated outputs from the session;

Picture one



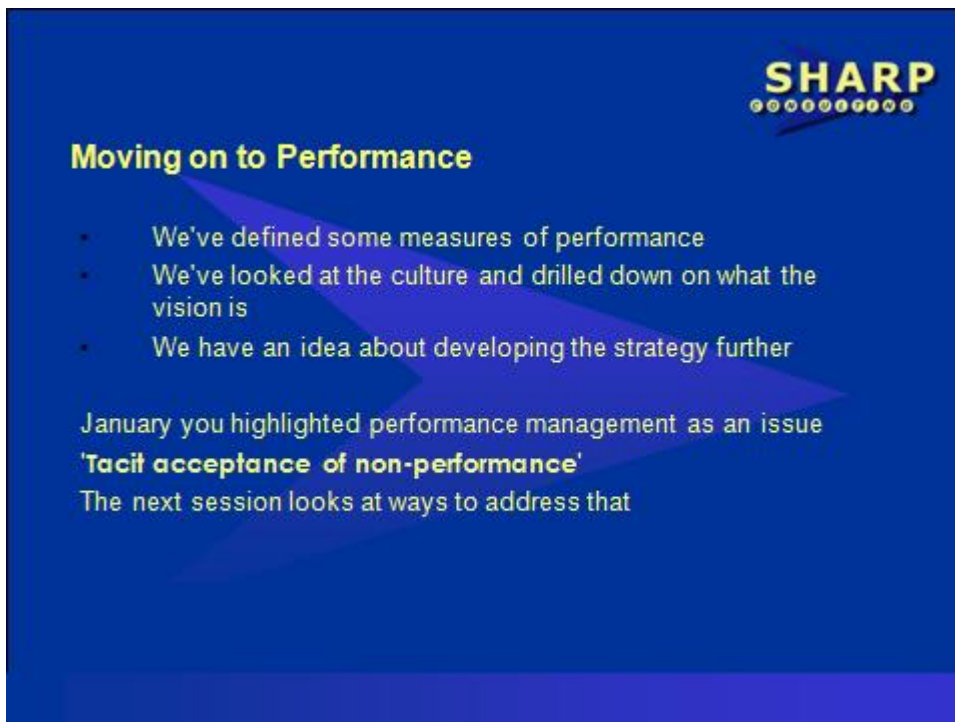
The final element of the first day was to move the thinking on to what the measurements of success would be for that strategy. If GMB@Work is woven through the GMB what will the individuals be achieving on an organisation wide basis. The outputs to the discussion were;

1. Financial stability
2. Membership growth
3. Organisation and retention
4. Membership experience
5. Reputation
6. Stakeholder experience

This discussion foreshadowed the content of day two, performance management. Slide two below.

Slide two





## Day two – Performance management (Chris Harvey and Neil Sharp)

Outcomes from the day

1. Introduction to performance coaching technique
2. Application to GMB context
3. Performance management and strategy

Session two was designed to take into account the performance issues that the SMT universally recognised were a problem in moving the Union forward. Performance management and performance management systems are key elements of organisational structure in any organisation. This had been explored at some level in the 'cultural web' exercise in the first two day session as a priority for the Union. In order to deal with this the day was put together in two parts; the first part was an introduction to performance coaching as a style of management and a way of increasing individual skill levels and the second part of the day was designed to explore how to work on a strategic level with organisational performance. This second element of the day would be a key element in achieving the objectives set out in the UMF bid document.

Chris Harvey, a performance management coach with a commercial background delivered a session on coaching as a style of management. A number of the SMT had identified difficulty in raising the level of performance of team members who were perhaps not underperforming but not performing to their capability level. The coaching approach uses the principle of emotionally intelligent interaction based

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around active listening and a concept known as GROW (Goals, Reality, Options and Will). Using this model as a basis for interactions with personnel can create a safe environment that challenges individuals on how they are performing, the principle can act as a sequential developmental approach with a number of questions that the 'coach' is posing at each stage. Applied over a sustained period it creates an atmosphere of trust and a mutually beneficial relationship. See slides three and four below.

Slide three


**Goal**

**SHARP**  
○○○○○○○○○○

- What do you want to achieve?
- What does success look like?
- How will you know when you have reached your goal?
- What would a milestone be on the way?
- How much of this is within your control?
- Is the goal positive, challenging and achievable for you?
- How will you measure it?

Slide four

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**Options**

- What could you do as the next step to meeting this goal?
- What else could you do?
- ...and what else?
- What are the benefits and cost of the different options?
- What if you had more time/power/money/etc?
- What if there was no history/politics?
- Would you like another suggestion?

The session had a mixed and limited impact with the group; the preoccupation of the SMT was on the most worrying underperformers in the Union. This technique was viewed as having a limited use in that situation for some members of the SMT with only a limited application for radically improving performance. Whilst they did recognise that there was value in the concept of coaching the SMT were more interested in discussing how to deal with this more general damaging underperformance across the organisation. The flexibility of the facilitators allowed the day to move on quickly to a 'warts and all' discussion about the problems that individual SMT members were experiencing with staff. This proved to be an invaluable exercise and placed in context a long established narrative amongst the SMT.

The Union has moved on considerably in the past five years, the changes that have taken place have borne a substantial amount of fruit in terms of the financial position of the Union and the membership levels. Nevertheless the process of implementing those changes has caused a great deal of organisational friction, simply via the scale and necessity of the changes that needed to take place. A legacy of that five year period is a perception of resistance and active undermining of the strategic position of the Union, common in most organisations during times of radical upheaval and change. The perception of that problem can however, be much bigger than the reality – the discussion that we were able to move into clarified this, perhaps for the first time, for the SMT. This realisation that the size of the problem was much less substantial than previously thought was a literal load off the collective mind and represented a clear breakthrough for the team. Perhaps a greater breakthrough was the ability to share those concerns in a safe environment and openly with other SMT members (for the first time).

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Following the discussion the day moved into a session on structuring appraisals as a way of linking the strategy 'GMB@Work' with personal levels of performance in the organisation. As part of the pre work and previous discussions with the project team and the SMT we asked them to identify existing systems within the organisation for performance management. These were extensive, a number of the federal regions have achieved Investors In People (IIP) accreditation and run half yearly reviews and yearly appraisals. Other elements of the organisation have more informal regular one to one meetings between members of staff and management to discuss progress against GMB@Work and other targets. This is a typical picture of GMB management structures, a number of good practices in different parts of the country but with no coherent application. This session was designed to explore a universal appraisal system for the Union that could be used to cascade the SMT decisions and deliver on the strategy and vision.

We started the afternoon with a basic overview of a strategic appraisals process. Slide five below.

Slide five

**Performance Management System** **SHARP**

What are the required elements:

- Systematically deciding and communicating what needs to be done (aims, objectives, priorities and targets)
  - Starts at the organisational strategy level
  - From the strategy you have plans (annual)
  - The actions required then get cascaded down the organisation as objectives (SMART)
  - Work is planned and expectations are set
- A plan for ensuring that it happens
  - Performance of work needs to be monitored (appraisal)
    - performance is rated or measured and the ratings summarized
  - Staff ability to perform is developed and enhanced (training and development)
- Top performance should be rewarded and poor performance needs to be addressed

Again the session had a mixed impact. There are some contextual reasons for this, trade union narratives have traditionally been against the concept of performance management and particularly appraisal systems. The narrative suggests that employers use performance management against employees and therefore the appraisal process is something that can be used against an employee. This is an old narrative but has a strong resonance amongst some elements of the trade union movement. The SMT were fully aware of the benefits of one to ones and appraisals

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in their own individual experiences across the country. However, the concept of a universal appraisal system was seen as unachievable because of the potential reaction to it. This hesitancy and resistance to universal appraisals is entirely rationale it stems from the previous discussion in the coaching session on resistance and undermining of the major change programme implemented by the SMT. The changes are still relatively young in the history and tradition of the Union and the opportunity to lose some of the ground gained through unpopular policies and management systems is all too real. Whilst the SMT were unable to commit to the concept of national universal appraisals there was universal commitment amongst the SMT to the implementation of their own form of performance management whether that was through one to ones with individual employees or local level appraisal systems. The unique environment that the SMT are operating in requires a unique approach to implementing modern management techniques.

The narrative that the SMT use is one that is clearly positive, one to ones and appraisals are a way of helping the Union's people and supporting them to do the job. The job in one way or another is about linking back to the core purpose that was identified in day one as driving the GMB@Work strategy. The discussion led on to a greater debate about consistency in the Union particularly in job descriptions and expectations of the officers in each region. This greater debate refers particularly to the Senior Organisers (SO) in the Union and what their role should be – the entire SMT were in agreement that SOs should be managing the implementation of the Unions strategy. Day two achieved a number of breakthroughs in team development and in uncovering some of the barriers in the path of implementing some of the management principles that are key to achieving the projects objectives. Whilst some of the barriers are immovable the route to implementation still exists if via an alternative path. These alternatives were explored in greater detail within subsequent meetings of the project team and the full SMT.

### **Day three – leadership** (David Evans and Jonathan Upton TCC)

Outcomes from the day;

1. Confidence in leading
2. Understanding the team and intervening appropriately
3. Practical management skills

The third day of the course was a practical approach to improving the confidence of the SMT members to lead their respective teams and provide a number of practical solutions to overcoming problems. The session was facilitated by TCC an organisation with a historical link to the trade union movement. This history brought a level of trust and the group were far more at ease at the start of this session than had been the case in the previous two days. The previous two days had seen some intense and at times difficult discussions; issues that had rarely been spoken about in the SMT environment had been candidly addressed. There was a clear sense by day three that the team had undergone some major developments.

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## Leadership of self

The session began with an overview of the principles of leadership and particularly on individual members of the SMT taking control of themselves and others in leadership situations. The 'grip' approach to leadership is used and developed by the Leadership Trust, (slide six below) the principle is simply that controlling yourself is the first step to successful leadership. In order to demonstrate this we used a number of slides and an individual gap analysis to identify a practical and logical way of gripping 'yourself'. The gap analysis exercise (ideal self vs real self) was set in the context of a discussion about positive leadership traits, the exercise was completed individually and then shared in pairs as a way of receiving independent feedback. Throughout the course of the leadership session a mantra of self awareness was established, the principle being self awareness, self control and self belief as the foundation of positive leadership outcomes.

### Slide six



## Leading the team

Having illustrated the principle of leading yourself the team session was a brief session on leading and understanding the team. In order to do this the SMT were asked to complete a number of interactive surveys that established where they felt their own teams sat on a scale of team performance. By using the interactive survey we were able to plot teams and explore some of the reasons for their position on the scale (slide seven below) – this allowed a frank discussion to take place on best practice in supporting and intervening in teams in practical ways. The experience of

the SMT is considerable and what this third day presented was a forum for open sharing of best practice.

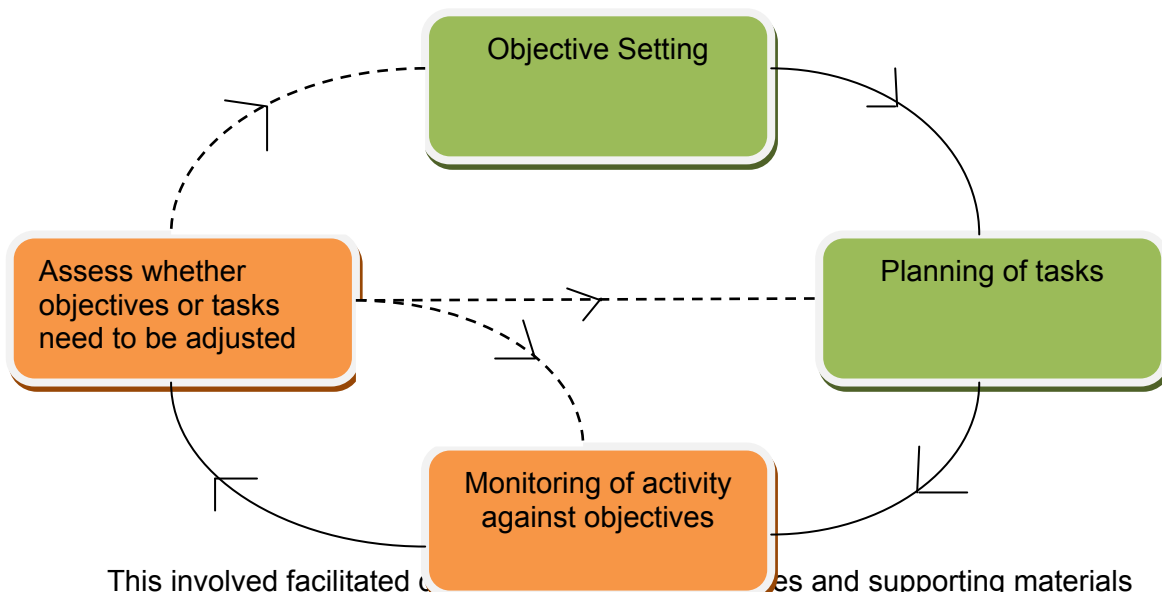
Slide seven

### Life cycle of a team

	Form	Storm	Norm	Perform
Leader's style	More directive approach, outlining how the process will develop and laying down a clear structure.	Needs to be supportive, actively listening to team members, and managing the conflict, generating ideas, and explaining decisions.	Acts as a team member, as leadership is starting to be shared. Leader helps to develop consensus.	TR: overview, but within to day running, the leadership between members.
Reaction to leader	Team members take a tentative, wait and see approach. Leader will be allowed to lead, but that doesn't guarantee support.	Leader is under pressure from more vociferous team members.	HD: support for the leadership within the team. Mutual respect underpins this.	RA: social relationships have developed which underpin the leadership of the group. PK: process issues are resolved.
Process	Process is driven by the leader. Some people are reluctant to contribute openly.	JM: Less likely to break down until conflict is resolved.	The core process should operate smoothly, although there is a danger of focusing on smaller process issues rather than core team work.	PMc: Process functions well, and is adjusted as necessary. Leadership is shared.
Trust in team	Individuals are not clear about their contribution. "Getting to know you" phase. Trust may start to be built.	AWi: Trust is focused into smaller groups as sub-groups and alliances form.	AG: As roles are accepted and clarified, trust and relationships start to develop to a greater degree.	AW: starts to operate on levels of trust as and relationships develop.
How decisions are made	Nominated leader is expected to make decisions. Some more vocal members may dominate.	AWi: Decisions are hard to make. Members are unwilling to give way. Compromise is a frequent outcome.	AG: Group is able to come to common decisions. Win-win is more likely than compromise.	AWo: decision making is easier - some decisions are delegated to sub-groups and individuals. AM: AM

### Leading the task

The final part of the third day focused on introducing practical tools to achieve tasks illustrated via discussion of everyday management tasks for the SMT and senior officers. Tools that were introduced supported the concept of a control loop Fig 3.4.1;



This involved facilitated exercises and supporting materials around best practice models in planning, risk analysis and event delivery.

Slide nine

## SMART Table

**SMART Tasks**  
Specific – Measurable – Agreed – Realistic – Time-bound

Name:

Specific (What - exactly - is the task?)	Measurable (How can successful completion of the task be measured?)	Agreed (Has the nature of the task been agreed with relevant parties?)	Realistic (Is it a realistic task?)	Time-bound (When will it be completed?)	Comments/actions (follow-up notes)
Make the tea	Production of a cup of tea	Discussed and agreed	Well within capabilities	Within 15 minutes	Drink tea, feedback assign washing up duties

gaining insight... influencing behaviour... inspiring change

Slide ten

## Risk analysis

Risk analysis allows you to examine the risks that you face with a task or project. It is based on a structured approach to thinking through threats, followed by an evaluation of the probability and cost of events occurring. It allows you to understand the detail of a task and to plan appropriately.

gaining insight... influencing behaviour... inspiring change

Slide eleven



## Events dear boy, events

### Roles and responsibilities

Name	Responsibility	Contact number on the day

### Resource list

Resource	Dates Due	Notes	Responsibility

### Session details

Time	Lead	Session Details	Purpose	Outline of what happens	Inputs and Outputs	Staff Support

“gaining insight...  
influencing behaviour”  
inspiring change



The experience of the SMT allowed this session to be as much about sharing experience from across the Union. This was a good session that illustrated the ground that had been covered throughout the course of the previous sessions. The SMT were in a position to be open, sharing concerns, problems and suggested solutions with each other.

### Summary

The first three day element of the five day training session was a difficult period of the project. The planned outcomes did not wholly materialise, explicitly around performance management. The reasons for this are symptomatic of an extremely complex organisation that has been working to consistently change and improve its performance over the last five years. The traditions, legacies and culture of the Union and trade unionism cast a very different shadow than corporate commercialism. The GMB is a democratic organisation arranged in a federal structure with proud traditions in all of those federal arms. The work that the SMT have carried out to move the Union towards a more consistent approach has been massive. What the three day session did achieve, as explicitly commented on by the General Secretary, was an honesty and openness amongst the SMT members that had never existed before. Whilst a number of our explicit goals for the session remained unresolved a less explicit goal of team growth and development had taken place. There was a clear commitment from the SMT to move forward on the principle of middle management taking responsibility for the management role; developing people; managing performance; and having responsibility and accountability for the achievement of GMB@Work. The focus and approach that the project team took next was where the project began to get traction as part of a wider concept of

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management development in the organisation. What had been learnt by all was that flexibility and adaptability of the concepts of modern management were absolutely key in a complex organisation such as the GMB.

### **3.3.2 Days four and five**

The second two days of the five day session with the SMT took place in London at the Montague on the Gardens Hotel in central London on 15/16 April. This was to be centrally important in developing an action plan to realise the projects objectives of stimulating the use of coherent modern management techniques across the GMB. The intended structure of the two days as discussed with the project team following the initial facilitated two days had been a session on managing change and a session on practical design for the next project stage (roll out of management training to senior staff and officers). It was decided that following the initial three of the five days there was a need to take stock and revisit this approach. The learning from the first two days, and even more so, the three days had been that traditional approaches to modern management training and implementation needed to be adapted in application to the GMB.

Tommy Brennan (Northern Regional Secretary) following the three day session *'What was, and became clear, is that managing a trade union and its employees is far different than managing in business. Therefore, typical business management (techniques) do(es) not fit comfortably in a trade union'*

The principles are sound but the application needed to be 'atypical'. This presented the project team with a need to reflect again on what they were trying to achieve with the objectives set out in the bid documentation. The very practical goal for the organisation above and beyond anything else was to have the next tier of senior people in the organisation managing the Union's business. This was clearly where the gap existed in terms of developing people, managing performance and implementing strategy. Between the set dates of the three day and the final two day session there were two opportunities to engage with the senior officers in the organisation. The first was the annual officers meeting in Edgbaston in the West Midlands on the 20<sup>th</sup> March and the second was a planned UMF meeting with Senior Organisers to discuss their job role in the organisation on 23/24<sup>th</sup> March in Scalby. Facilitators suggested that both were an opportunity to test some of the issues that had presented challenges during the facilitated session; the project team invited the facilitators to attend and present at both events.

#### **3.3.2.1 Edgbaston**

The event in Edgbaston is a yearly event that represents the culmination of the targets for teams with measures and metrics reported on. All officers c270 from across the Union's nine regions plus representatives from National Office, the National Administration Unit, and the European Office attend. The format is a two hour presentation on where the Union is in comparison to the previous year and how

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the Union is faring against GMB@Work targets in the current climate. There is an opportunity at the end of the presentation for a question and answer session with the General Secretary. This was the opportunity to reinforce the conclusions that the SMT had come to on day two of the three day; namely that the level of resistance to the GMB@Work programme of reform and the strategic direction of the Union was much lower than perceived. It was also an opportunity to test the level of satisfaction of officers with the Union and the level of optimism that the officers had for the Unions future and their own future within it. This would very roughly indicate whether there were significant underlying issues that the Union needed to be aware of. In respect to the project and the objectives the information could be used to analyse how the SMT were shaping their approach against realities rather than perceptions.

### **Method**

Using handheld voting technology facilitators worked with the SMT and the project manager to design an interactive questionnaire to elicit feedback from the officers on a number of key issues. It was aimed at gaining insight into officers views on GMB@Work targets and the GMB@Work programme of reforms. The rationale for this was that GMB@Work represented the biggest change for officers in the way that they have to approach their work.

### **GMB@Work**

The principles of GMB@Work are about organisation, supporting and maintaining workplaces in their ability organise and represent themselves. This organisation principle was the foundation of the trade union movement but in recent decades it had been lost. The alternative model of trade unionism was a servicing model where officers were representatives in workplaces – this model was difficult to maintain and led to financial pressures and poor membership retention. Nevertheless a departure from this to the organising model did of course cause problems that led to a number of malcontents who in the past were not managed or communicated with in a positive way.

During the Edgbaston session an instant feedback session was facilitated using the handheld voting technology. The session covered the following areas;

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### Content

The session was broken into six sections of five questions.

- 1 *Introduction* – these five questions were used to get the audience familiar with using the handsets and the different types of voting that were expected.
- 2 *Demographics* – these questions established age, gender, position, office, in order to assist with the reporting
- 3 Knowledge of the GMB@Work – five questions on understanding the Unions vision
- 4 *Perceptions and attitudes* – five questions relating to GMB generally and importantly attitudes towards GMB@Work
- 5 *Biggest challenges* – questions on the challenges that the country, the GMB and individuals face
- 6 *Optimism* – looking to the future what did they feel optimistic about.

The handsets were distributed and participants were reassured that any information given was only being recorded for anonymous data analysis. The system was set up so that the hall was given an instant view of the results on the screen following the question slide as below;

Slide twelve

1. How far do you agree with this statement on a scale of 1 – 5. **GMB@Work has been a positive step forward for the Union.**

- 1) Strongly agree
- 2) Agree
- 3) Neither agree nor disagree
- 4) Disagree
- 5) Strongly disagree

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tcc

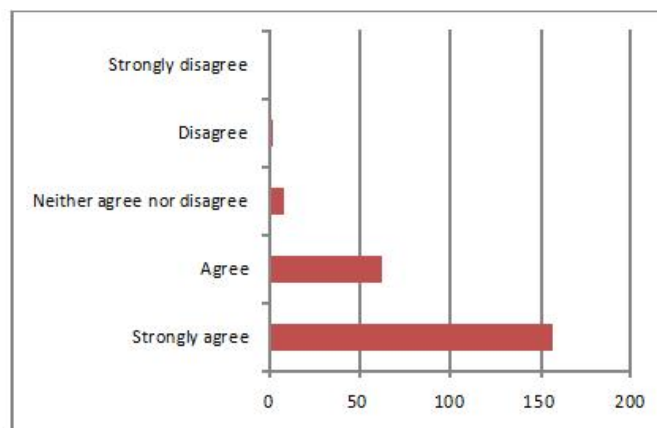
GMB  
PROTECTING YOU  
AT WORK



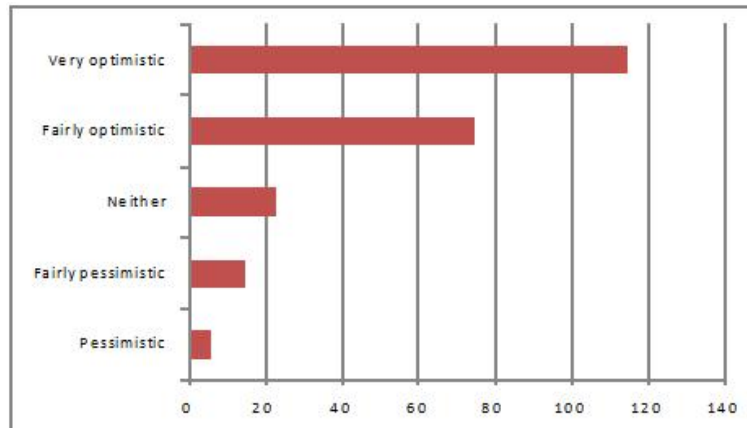
### Outcomes

The exercise tested the reaction to GMB@Work as a strategy and as measured perceptions of its success as a change programme. The results were positive, 237 participants responded throughout the questioning, below is a sample of the key results;

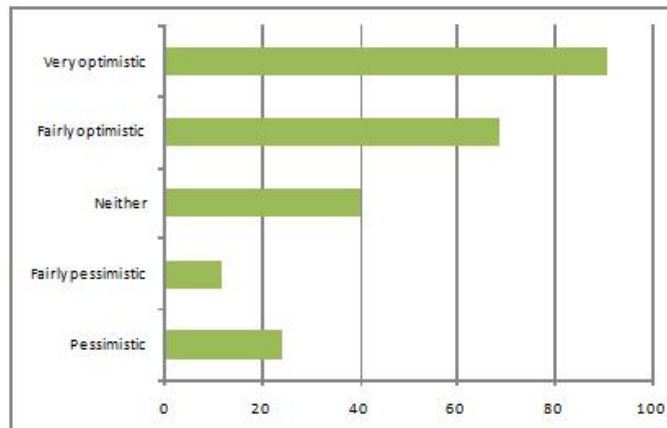
1. *How far do you agree with this statement on a scale of 1 – 5 (1 strongly agree – 5 strongly disagree). GMB@Work has been a positive step for the Union.*



2. *How optimistic are you on a scale of 1 – 5 (1 very optimistic – pessimistic) about the future of GMB@Work?*



3. *How optimistic on a scale of 1 – 5 (1 very optimistic and 5 pessimistic) are you about your future in the GMB*



The results clearly gave credence to the discussion that had taken place on the performance management day. The results from the Edgbaston event were fed back to the project manager and the General Secretary in the following week. It was decided an SMT session on the analysis in the final two day would be a benefit and provided a clearer foundation to make decisions on the roll out of management training to the senior staff.

### 3.3.2.2 Scalby

The meeting of Senior Organisers in Scalby a few days after Edgbaston was the second tranche of an initiative that started off the UMF project in October 2008. Harry Donaldson explains what the Union gained from these events

*‘Following the delays in the project starting the Senior Management Team took the decision and the opportunity to engage with the Senior Organisers, a key group within the management of the GMB to create the opportunity to meet, discuss and debate their current role, to provide them with the level of information supplied to the Senior Management Team.*

*A two-day session was arranged at Scalby just outside Scarborough for this session. This was a major change in approach by the Senior Management Team to provide*

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*the space and an open environment where an open and frank discussion could be held.*

*This meeting was the precursor to the project implementation and was certainly beneficial in determining an understanding of the Senior Organiser Group, the lack of consistency of roles across the Regions and the varying levels of confidence and competence to participate fully in delivering GMB@Work.*

*The session was a genuine attempt to allow the group to explore the role of the Senior Organiser, their functions and responsibilities.*

*This session was an open and frank exchange within a setting providing space and some degree of freedom for this group to fully express their views, opinions and challenges.*

*The Senior Management used this opportunity to explain their leadership role within the GMB and to provide access to documentation in terms of statistics of all our measures and metrics.*

*Each Regional Team of Senior Organisers provided the details of how they carried out their role, this led to significant differences across the Regions with no consistent role being applied.*

*This was illuminating to all Senior Organisers and showed up real gaps in applying all the elements of their Job Description underpinning the needs of the UMF Project.*

*There was a certain degree of cynicism expressed by some Senior Organisers who challenged the purpose of the event, what outputs would be achieved and more importantly would this make any difference this was to be expected.*

*This exercise did however build a level of understanding of the journey we as a group of Senior Management and Senior Organisers had to make in ensuring a Step Change in how we managed our resources within the GMB and how we delivered GMB@Work.*

*The output from these initial two days provided a level of understanding and knowledge as to the Senior Organiser group as a whole.*

*It was explained to the group that we were successful in securing funding from the Union Modernisation Fund to Develop Modern Management Methods within the GMB and that they as a group would be key in the GMB delivering our strategy.*

*Feedback from the session was positive with this group in the main looking to develop a common role for Senior Organisers within the organisation and proved to be of benefit in setting the scene for our future direction.'*

At the March Scalby event following the initial three day session it was felt that facilitators should come and meet the Seniors to get a sense of the issues that were being discussed. It was also an opportunity to provide a taster session of some of the material that may be included in the roll out of management training to the next level

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of the organisation. One of the elements that we were particularly keen to look at was a sense of where the Seniors saw issues with the organisation – we used a ‘traffic light’ exercise to determine this. The participants were split into groups and given a few minutes on one question, they then passed their answers to another group who added to their information and vice versa. Using the handheld devices we then asked the group as a whole to prioritise the issue that had been raised. This stimulated a frank and open discussion in front of, and involving, SMT members. This represented a shift forwards with open exchange of ideas that had been difficult to achieve amongst the SMT.

Slide thirteen



What should we be doing?

1. Things we should stop doing?
2. Things we should do more or less of?
3. Things we should start doing?



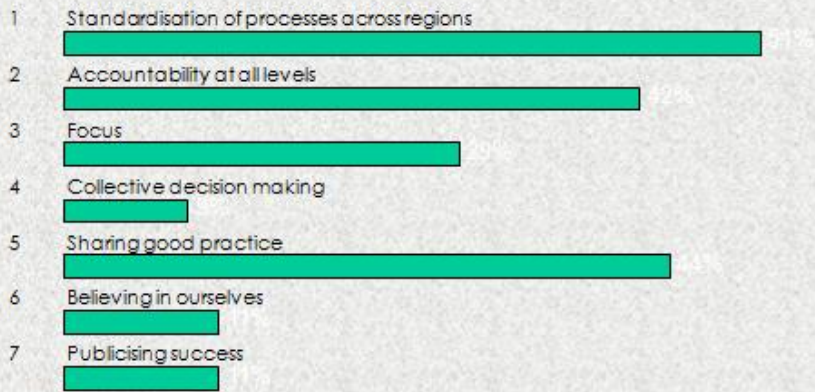
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GMB  
GMB@WORK

Slide fourteen



## Things we should start doing

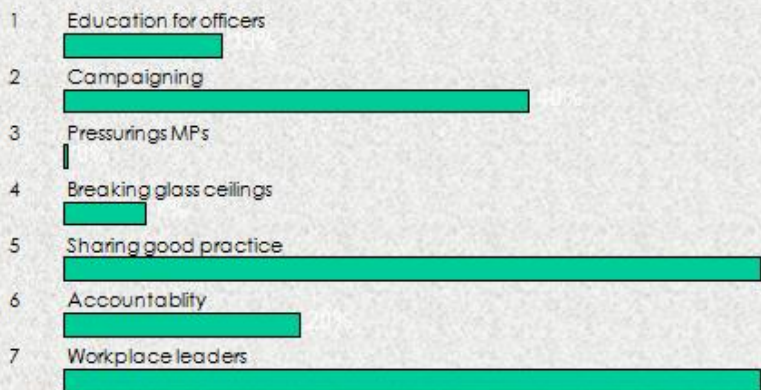


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Slide fifteen

## Things we should do more of

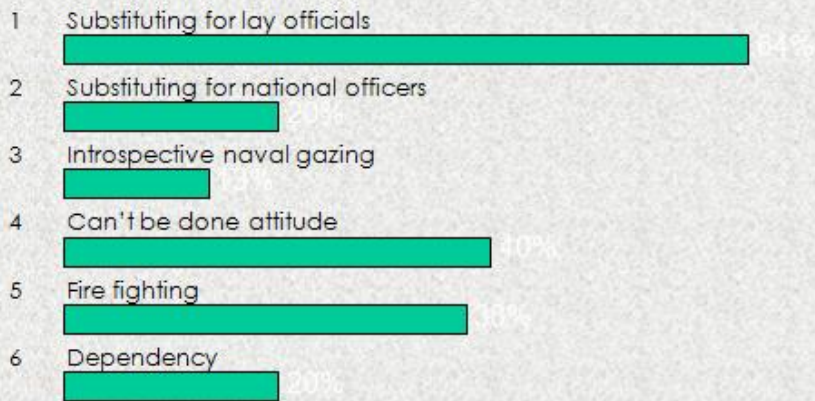


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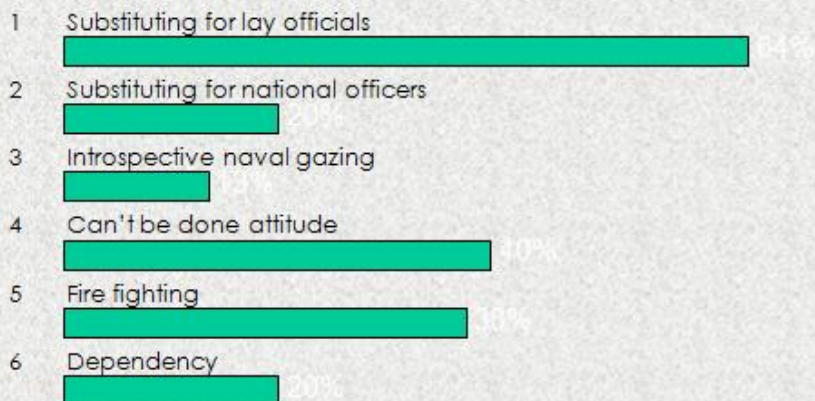
Slide sixteen

## Things we should do less of



Slide seventeen

## Things we should do less of



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As part of the taster we also had a facilitated session on core purpose and team leadership. The information and feedback from the session was extremely useful in preparing for the final SMT session. What we found from the feedback to this session, coming so close after Edgbaston, was that the engagement with Seniors and the frank discussion about the Union was welcome. The sessions at Edgbaston and Scalby seemed to underline the point that the SMT were trying to make. Seniors need to be involved in directing the organisation and given the tools to control the implementation of strategy.

### **3.3.2.3 Days four and five (SMT training)**

#### **Outcomes**

1. Agree content for roll out of training
2. Agree in principle the application of standard management approach
3. Agree and identify teams for the training roll out
4. Agree format of training
5. Agree follow up activities.

#### **Day Four**

Day Four of the SMT session was spent going through detailed feedback on the Edgbaston event and reviewing the work and feedback from Scalby, including the observations of the SMT. What did become clear in discussions around the information was a consensus on the central goal for the project. Senior's and staff able to manage the organisation, what that would mean is an agreement from the SMT (federal arms of the Union) to implement practices that provided Senior's and staff with the tools to perform that management function. The agreement was a recognition of the different positions of the various federal bodies of the Union and the different starting points for some of them.

An example of those different starting points can be found in the approach in different regions and offices to the disciplinary process (a key issue given the nature of the UMF). The Congress policy documents clearly state that Senior Organisers have the authority to be involved in and even to instigate the disciplinary process in their capacity as line managers. Extract Policy Set 2 – Briefing on Disciplinary Procedures.

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## APPENDIX 1

### AUTHORITY TO TAKE DISCIPLINARY ACTION AND HEAR APPEALS

Disciplinary Action	Action To Be Taken	Appeal To Be Heard By
Stage 1	Line Manager / Regional Secretary / SMT	Regional Secretary / SMT
Stage 2	Line Manager / Regional Secretary / SMT	Regional Secretary / SMT
Stage 3	Line Manager / Regional Secretary / SMT	Regional Secretary / SMT
Stage 4	Line Manager / Regional Secretary / SMT	Regional Secretary / SMT

The lines of authority in the policy are clear but the reality on the ground is that some 'line managers' do not have any experience of disciplinary processes while their equivalent in a neighbouring region may have conducted a number of disciplinary procedures. This pattern is repeated across the job roles of the organisations 'managers', what is more many managers expressed a perception of a lack of support in realising elements of their job. To raise the organisation to a level of consistency and coherence in approach their needs to be an agreed standard that the SMT can apply to the federal elements of the Union. The design of the roll out of training was a way of agreeing a provisional set of key competencies that standards could be derived from by each federal arm.

#### **Day Five**

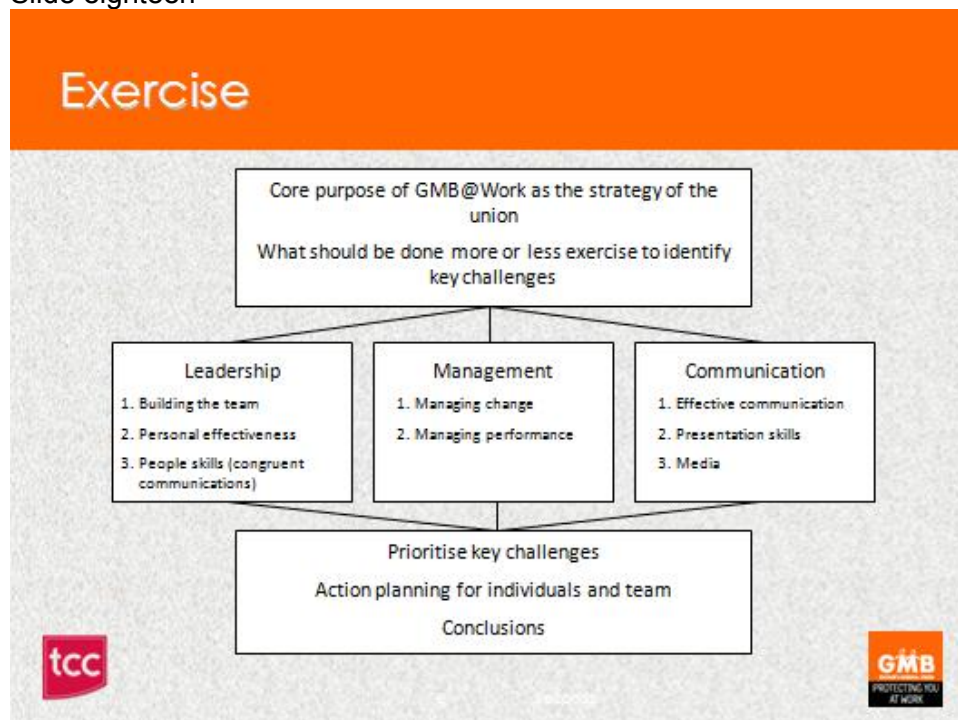
Day five of the SMT set out to agree a minimum standard of what the Union's 'managers' required. The minimum standard should allow the Union to push the responsibility and accountability for the achievement of the Unions goals down to the next level of the organisation. By pushing that role down it will have the benefit of improving the communication, the decision making, staff development and general performance of the Union. The UMF project presented an opportunity to begin the process of improving the standard by introducing the management concepts to the management tier and linking it with action plans across the Union to develop those standards in the course of the next year. To do that it was necessary to map out exactly what the Union were looking to develop, here was a chance to use best practice from regions and offices, combine it with practical theory into a development plan that regions and offices could use to develop their staff to the level required.

#### **Designing the development plan**

The facilitators presented a skeletal model (fig. 10) of a development plan for managers that encompassed a number of key competencies underpinned by the strategy of the Union 'GMB@Work'. This skeletal frame was the basis of key competencies to be introduced to managers and would form an agreed basic development plan for the Unions federal arms, the SMT were presented with each of

the elements (Appendix Four). A facilitated discussion took place drawing out the views of the SMT on what were the key elements required in the training. This session was designed to give ownership of the managers training to the SMT.

Slide eighteen



The SMT identified the management module containing performance and managing change as the core competencies required. The discussion highlighted managing change as a key in addressing some of the historic issues, allowing managers to own the change and see their role as acting as change agents for it. Giving managers the tools to build their own confidence and approach management tasks through a framework self awareness was an obvious supportive step. Using elements of the leadership day from the SMT training would facilitate this. Communications was seen as important but a secondary priority to the management and leadership modules. The emphasis on personal responsibility of each manager to deliver GMB@Work would underpin and link the training to strategy and vision.

In the short to medium term the content of the introductory roll out to managers needed to act as an extension of the work that had gone on in Scalby. The conversation with the managers had begun; the introductory sessions were a perfect way of continuing and deepening that conversation and building the sense of inclusion that the SMT needed to foster. The emphasis of the sessions would be two fold; feedback and sharing of experience; and introduction to technical skill and development.

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### **Identifying the team and format**

Having broadly agreed an approach to the roll out of the introductory management programme the SMT were then tasked with identifying the teams that should take part in the training. The teams that were identified were;

1. All Senior Organisers
2. All Membership Development Officers
3. All Staff with management responsibilities.

In total this amounted to 64 members of staff to undergo the training. The original bid had the training taking place in regional offices made up of regional participants. This was viewed as a possibly weak design. Teams in the regions and offices are well established and relationships mature. The roll out of training was an opportunity to take participants outside of the team environment and to put them in with peers from across the country. This approach would allow a cross fertilisation of ideas and prevent existing assumptions to take root in the course of the sessions. The sessions would be held in a central location with members of staff travelling to attend.

### **Next Steps**

Facilitators were tasked with putting together a programme and materials for the training. The project team would sign off the materials and feedback from each session would be reported to the project manager.

## **4. Facilitated Team Development**

### **4.1 Introduction and background**

The roll out of the management training focused on the management tier below the SMT and consisted of a two day introductory course. This element of the project was greater in scale. It was about taking the standard approach agreed by the SMT and introducing it to the tier of managers that the Union would like to see effectively 'managing' the organisation. The situation at the time of the projects conception, and to some extent still, was one of inconsistency in the management role, different job roles throughout the organisation and differing levels of experience and competence in key management areas. The output from the five day of a standard development plan for managers, and the commitment of the SMT to implement it in their federal arms through action plans, represented a clear move to address that situation. The SMT are committed to bringing managers closer to the decision making structure of the Union in return for a reciprocal commitment from managers to fully perform the line management function. That conversation had already begun with the managers through the work in Scalby and Edgbaston. The two day training session for managers was an extension and a practical step towards it becoming a reality for those managers in day to day situations. The follow on step would be for individual federal elements to derive a set of measures and metrics for teams that reflected the strategy and the management responsibility that would be asked for from the management tier. This process was also a way of gauging the preparedness of teams for this step with feedback from officers in line with the discussions at Scalby and Edgbaston.

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The management training was rolled out to eleven teams consisting of the Senior Organisers, Membership Development Officers and Staff with management responsibilities from across the nine regions, Head Office and the National Administration Unit as identified by the SMT. All individuals identified have a distinct function in managing the Unions personnel and successful implementation of the GMB@Work strategy. The training took place in a central venue in London with each session comprising attendees from across the country in order to ensure that group dynamics of individual teams had minimal influence. The content of the training reflects management best practice and the considered input of the SMT.

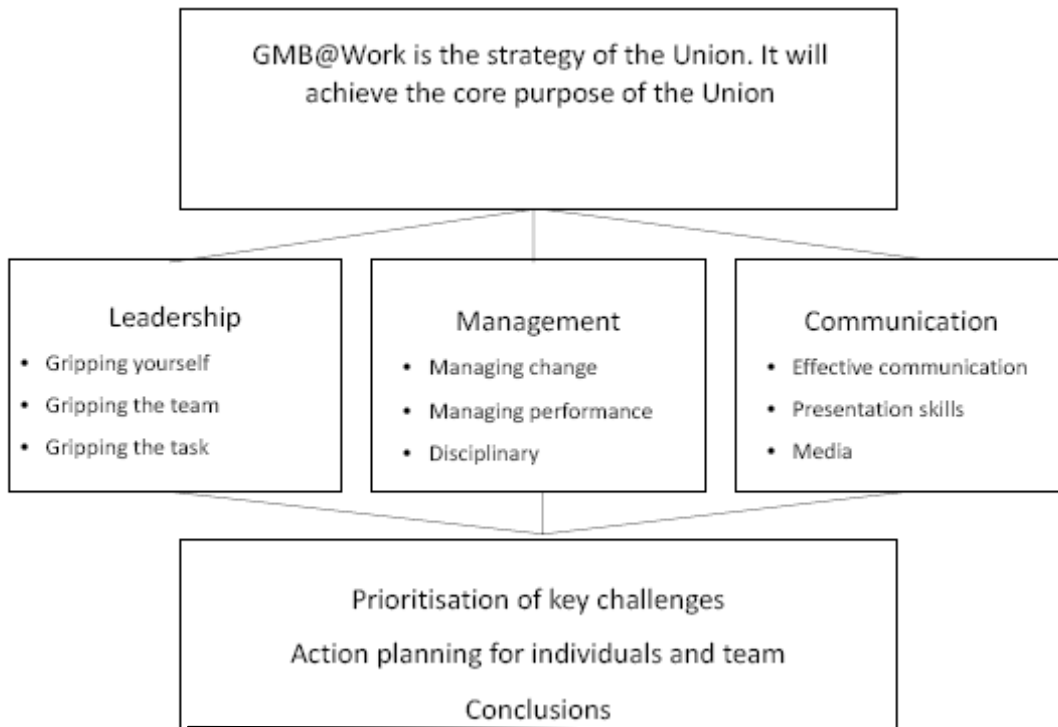
## **4.2. What we did**

### **4.2.1 Training content**

We developed a number of modules with specific practical applications in strengthening the knowledge and skills of the management teams for the SMT to review (Appendix Four) in the five day session with the SMT. Underpinning the selected modules was an exploration of organisational core purpose and strategy; firmly locating the sessions within the GMB@Work strategy. Explicit was a reference to ownership of, and for, the delivery of GMB@Work by the management tier. This consistent message was embedded as a recognition that the SMT still had (have) anxieties about the level of acceptance of the GMB@Work change programme. In effect this message was and is constantly being reiterated and part of the change programme is for the management tier to own the concept. The SMT meetings and conversations with the management tier to discuss job roles and greater responsibility within the decision making structures of the Union are part of that ownership transfer. The training represented a very practical and natural extension of the conversation with the management tier; it also provided real evidence of an organisational commitment to developing the management role. Below is the training development plan that was used throughout the six sessions to frame the content of the two days.

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Fig 4.1 Training development plan for managers



#### 4.2.2 Fulfilling the development plan

The course was designed to be flexible enough to represent a comprehensive introduction to the principles as well as providing enough practical information to make it of some immediate relevance to participants. This section of the report will detail those elements to give a flavour of how the training was conducted. It is useful to note the importance of the training as a link to the development of the organisational position of the management tier, a significant portion of the two days was given over to establishing that context. The training becomes part of that wider organisational journey providing scope for the Union to use this training framework as a fundamental development plan for its management tier.

##### **Pre work**

In order to build useful relationships and inform the training delivery, we designed a short online survey that was emailed to participants in advance. Each participant was also sent the training framework and a short introduction to the course. The key questions in the survey were;

1. What do you expect from this training?
2. What is the one thing that would make your job easier?

The pre-work highlighted some key organisational issues of concern that were addressed in the training. There were some consistent themes; it also revealed the



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positive impact of the SMT's meetings with the management tier. The themes included:

- a. What do you expect from this training?
  - i. 'An understanding of the management role in the GMB'
  - ii. 'A consistent approach to management from across the GMB'
  - iii. 'To find out about management techniques'
  - iv. 'To improve my knowledge and develop new skills'
- b. What is the one thing that would make your job easier
  - i. 'More time'
  - ii. 'Less interference'
  - iii. 'People working harder'

The pre-work brought some of the more difficult issues to the table and we were able to discuss these at the beginning of the course. This was formalised through the traffic light exercise explained in **Section Three** of this chapter of the- participants were asked in groups to identify things the organisation should Start doing/Do more of /Do less of/Stop doing – the outcomes of this exercise were prioritised by the participants through the use of handheld voting devices. The time spent doing this allowed people to feel that they had been heard and encouraged them to engage in a frank discussion. The benefit of this was to develop trust and prevent particular personal issues from dominating the proceedings. Moreover, it served to further develop the conversation that the management tier feel engaged in with the SMT on their organisational role.

#### **GMB@Work – The Core purpose**

This section of the course was designed as an interactive session that focussed on the core purpose of the Union and asked participants to consider how the core purpose transmits through the organisation. The aim was to establish the Strategy as the clear way of realising that core purpose and that through managing the implementation of the strategy successfully participants were contributing to organisational success. In a values driven organisation such as the Union this is a particularly emotive subject. The work that Neil Sharp carried out during day one of the SMT five day was the basis of the element of the session. A number of the discussion topics raised were in parallel to the issues raised by the SMT. In effect it was a reassuring exercise as the managers on the whole recognised the purpose of the Union in similar congruent ways to the SMT. The session on core purpose involved facilitated discussion and some illustrative exercises such as the one referenced here (this followed a detailed discussion on core values)

#### Positioning statement exercise

Participants are given 5 minutes to think about the following before articulating the, positioning statement  
 “You are by the lift and you meet a charity worker from overseas who has never heard of GMB and doesn’t know what you do. He hears that you’re from GMB.  
 He asks you, “So what do GMB do exactly?”  
 What do you say?”

The exercises and discussion were designed to set a tone of ownership and belief in the organisations values.

**Leadership – Strand One**

Realisation of the GMB@Work strategy will come through positive leadership throughout the organisation. There is a twofold approach to achieving this. First, there is an imperative in the organisation to empower people to realise their leadership potential; and second, there is practical support in helping individuals to develop their leadership style or role. The leadership strand mirrored sections of the SMT five day session and is based on the idea of self -awareness and self-regard as the first step to gaining control of yourself in order to lead your team to achieve the task. Awareness permeated all of the materials that we used in this section of the course including individual gap analysis, introduction of Belbin and life-cycle theory as tools in understanding teams successfully as well as a number of practical tools to enable task management including risk analysis, project pro forma’s and planning tools. The following diagram represents the first step of self awareness.

Self Awareness



Having taken part in the session on leadership participants are left with a number of tools that enable them to analyse their own situation, that of their team and to work on the execution of tasks.

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## **Management - Strand Two**

Modern management capability is the overarching aim of the UMF project, this strand of the training sought to introduce two important areas for any manager. Firstly managing change and secondly managing people's performance.

### *Managing change*

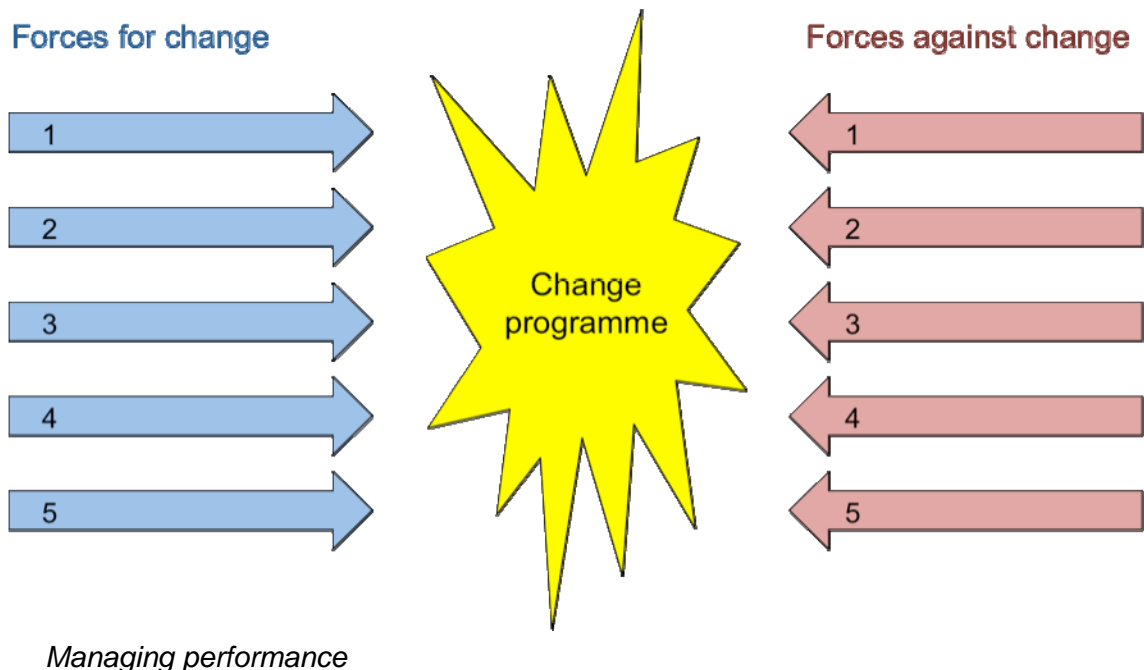
We have referenced the organisational change that has occurred in the GMB over the last five years. Change programmes are difficult and can be made more so without powerful structures and networks of change agents across the organisation. Introducing managing change with a practical example in GMB@Work was a successful way of relating the theory to everyday reality for managers. From the perspective of the SMT it is important that the management tier realise their position in relation to change programme. It is the management tier that will be the 'change agents' on the ground, making the change happen, reinforcing the gains and preventing a return to old practice. This section was couched in a frank discussion about the difficulties of the GMB@Work programme, anecdotally some of the participants were able to articulate their own previous resistance to change. In the same breath they were able to rationalise it in the context of '*initiative culture*' - being continually overwhelmed by change programmes or new initiatives that only last for five minutes and are not seen through. There was realisation and almost universal acceptance that GMB@Work was here to stay. The conversation and the anecdotes were discussed during an overview of the theory and a practical exercise on producing a strategy for a change programme these are detailed here Fig 4.2.2.1

Fig 4.2.2.1



*Force field exercise*

*'Think about one or more of the changes that were identified in Day One. Identify all the factors that support the change and all the factors that oppose it (think about internal and external, people, organisational culture, training, leadership, resources etc).'*



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This forms an important element of this course given the emphasis of the UMF bid in reducing the number of grievances that the Union suffers. The issue of underperformance is particularly difficult to deal with in any management situation; it is a qualitative issue and can be open to subjective interpretation. In order to deal with the difficulty and the grey areas that exist when dealing with underperformance the session introduced a basic structure that encourages a systematic approach to dealing with underperformance.

1. Identifying performance issues
2. Getting to the root of it
3. Developing support plans
4. Giving effective feedback

Participants undertook a best practice workshop for each stage of the framework, reporting back and sharing experiences through action learning techniques. This was important in illustrating the application of the framework in real life situations.

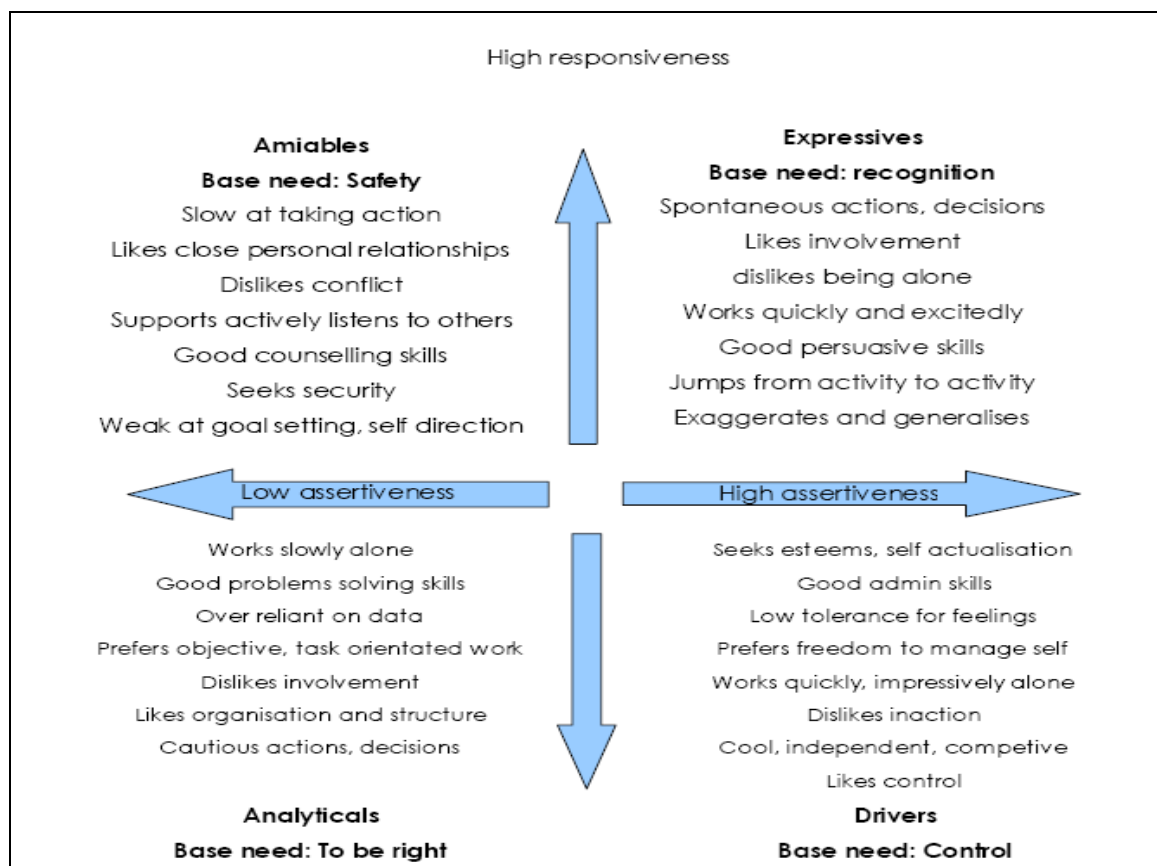
#### ***A difficult session***

This was a difficult session to conduct. The participants are individuals with extensive experience that could often exceed twenty years in the Union. In that time underperformance has been and is a recurrent issue for individuals to deal with. It is a difficult issue and the sharing of best practice and the outlining of a structure of how to deal with it was useful and well received. There needs to be a caveat attached to this, the Union does not have an appraisal system, at this stage, that can be discussed and rolled out in a training session such as this. While the session was able to deal with strategies for dealing with underperformance it could not provide generic supporting structures. Similarly the session canvassed opinion through a discussion with officers on disciplinary procedures, it highlighted some issues that were encountered in the SMT session, namely disparity in job role and differing experience ( and expectation) on dealing with a discipline. This key and difficult session was no doubt informative but the feedback forms a powerful recommendation that the Union needs to work towards better support structures and clearer lines of authority if it is to fully achieve the improvement in performance management that it is looking for. The outcome of the UMF project that will help achieve this, not immediately but in time, is the action plans for each team and the commitment from the federal arms of the Union to review and update on a regular basis. These structures are important elements in addressing this 'problem'.

#### **Communication - Strand Three**

Communication style was included as a very short introduction with a focus on self-awareness. The intention was to build on individuals' self-awareness established in the strands on leadership and management. Communication styles have an application in day to day management but also for trade union officials issues of; media, negotiations and public speaking are also important. Communications was

only briefly touched on but in terms of development of officers this is an important skill. The work that we did placed participants on the following pair of axis (assertiveness and responsiveness) with respect to communication and asked them to consider the skills that they need to operate on the axis.



### 4.3 Outcomes, feedback and evaluations

#### 4.3.1 Outcomes - The major issues

The scale of the roll out of training lends itself to some broad analysis in terms of feedback and in terms of how the participants felt about the process. The sessions were characterised by frank discussion throughout. The overriding message from the training has been a positive recognition of the advance the Union has made in the last few years. The application of GMB@Work has caused growing pains as any programme of change does (especially in a large and traditional organisation). Nevertheless the perspective of the management tier is that the Union is moving in the correct direction and there is respect across the board for the leadership. Below are a number of key discussion points and outcomes from the training sessions that relate directly to the issue of developing management structures. The biggest challenge will be consistency, a recurring theme; this is something that a federal

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organisation is familiar with and able to deal with as long as there is a common understanding of direction.

#### *Consistency in the line management role*

The SMT and Congress policy state that all ‘managers’ should be performing line management functions. In some instances, this already happens and to some good effect. The extent to which officers are currently engaged in managerial roles rendered the material of the course more or less relevant. Not all regions and offices have the same style. For understandable reasons the role has developed differently across different regions. The issue of consistency surfaced on numerous occasions throughout the delivery of the training. The Union has a historical federal structure that has influenced development and practice in different areas. This is of course a strength, but can impact on the sense of equality/fairness amongst employees at similar levels when it comes to job role. We believe that the ongoing discussions at SMT level about the development of consistent approaches in particular areas should be furthered.

#### *Disciplinary*

Consistency was highlighted particularly with reference to the disciplinary procedure. Some officers and staff were happy with their position in relation to the disciplinary procedure and content to use it. Other officers and staff were aware of the policy document and the assumption that they could be expected to use the disciplinary procedure but were not able to relate this to the normal protocol that they experienced in their particular team. This made some of the discussion interesting rather than practical for them – simply because those protocols do not always exist.

#### *Managing performance*

The workshops for this element concentrated on clear examples of underperformance but did not touch on managing performance against clear and established performance indicators. While participants found it useful the consistency of approach again was an issue. Some of the management tier use appraisals and one to ones to set goals and targets to measure performance against, whilst others are unfamiliar with this. From certain management perspectives, appraisals are the way to actively manage the strategy and objectives of the organisation. There is a debate within the SMT about how appraisals etc. apply in the organisation. This debate is likely to continue with an outcome of regional difference based on the particular conditions in each region. All regions/offices should be stating a clear position and way forward on this.

#### *Staff inclusion*

There was a consistent message from all of the groups that staff inclusion was something that needs to be addressed. The move to include the officers in an annual meeting about the performance of the Union highlights the absence of staff and perhaps brings an unintended sense of differentiation. Officers were also keen to see staff trained in GMB@Work and the core purpose of the Union.

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### 4.3.2 Feedback - Analysis of the traffic light exercise

All participants took part in an exercise to identify the most pressing priorities from their perspective of the Union. During the exercise participants were asked in groups to come up with answers to the following questions;

1. What should the Union start doing
2. What should the Union do more of
3. What should the Union do less of
4. What should the Union stop doing

Having answered the questions the group then discussed and clarified the content of their answers. These were then transferred into an interactive voting system, the conclusion of the training was chosen as an opportunity for the participants to prioritise the issues identified.

Each one of the six training session produced individual sets of priorities, analysis of the issues has allowed us to categorise them into nine broad themes. The weighted voting has been further interpreted to give a percentage figure for all 59 participants giving an indicative set of priorities for the Union. Examples of the issues grouped into the categories gives a sense of the issues and can be found in (Appendix Five) of this document. A health warning needs to be attached to the figures as the nature of the means that there has been a high level of qualitative interpretation .

Chart4. 3.1 below outlines the priorities as voted for by participants



(Appendix Five – List of Priorities identified)

Interpretation of the information from this exercise is useful as a guide to the common issues. The participants were given complete free reign and the groups were mixed



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with officers from across the country. There are some fairly consistent messages with the top five priorities attracting 79 per cent of the vote. If you count consistency in officer training with consistency that figure rises to 82 per cent. A large vote for cultural change is to be expected in any organisations as is a vote for improved management, once removed the most distinct message is around **staff inclusion** followed by **consistency** (already highlighted as issues).

## Evaluations

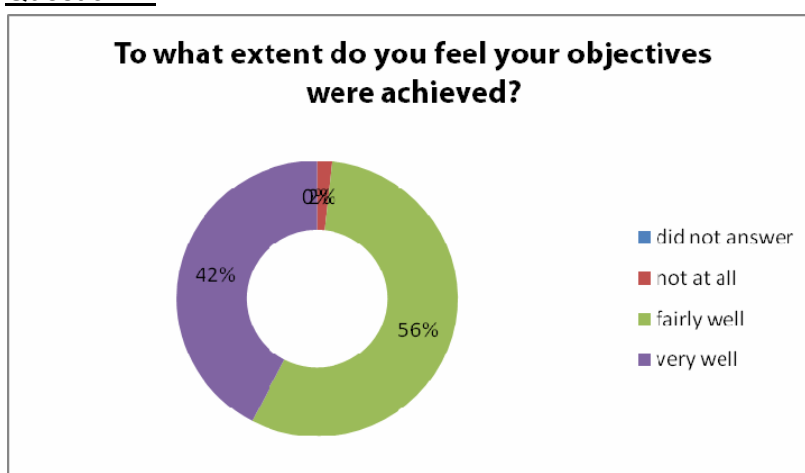
In order to fully evaluate the experience of the officers and staff we asked each participant to complete an evaluation form. It sought to explore what the participants wanted to get of the training and how far that expectation was met, it sought to explore what the GMB wanted to get from the training and how far that was achieved. The evaluation also asked for detailed feedback on each element of the session and asked for participants to rate the outcomes of the days. The response was overwhelmingly positive reflecting the warmth with which managers have accepted the provision of training. Below is a snapshot of the evaluations.

### Question 1.

What did you expect to gain from the event?

1. *'Re-focus management skills and how to utilise and benefit myself and GMB.'*
2. *'Clearer understanding of what the organisation wants me to do.'*
3. *'Assertiveness. Taking control of situations.'*

### Question 2.

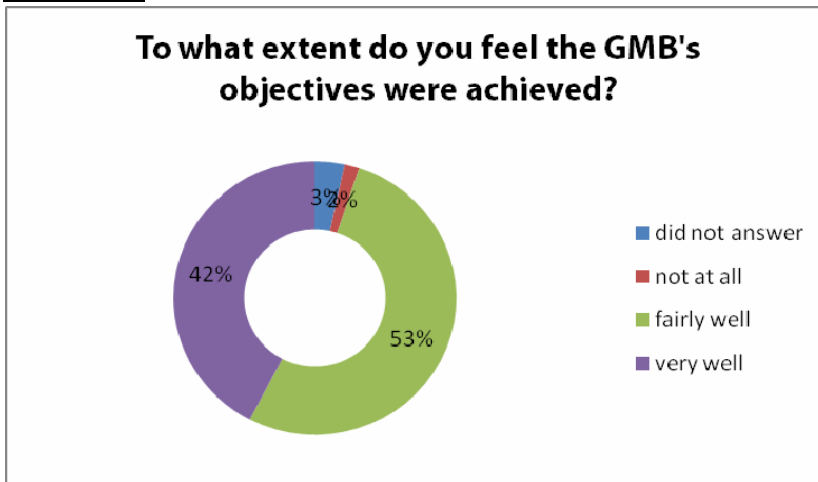


### Question 3.

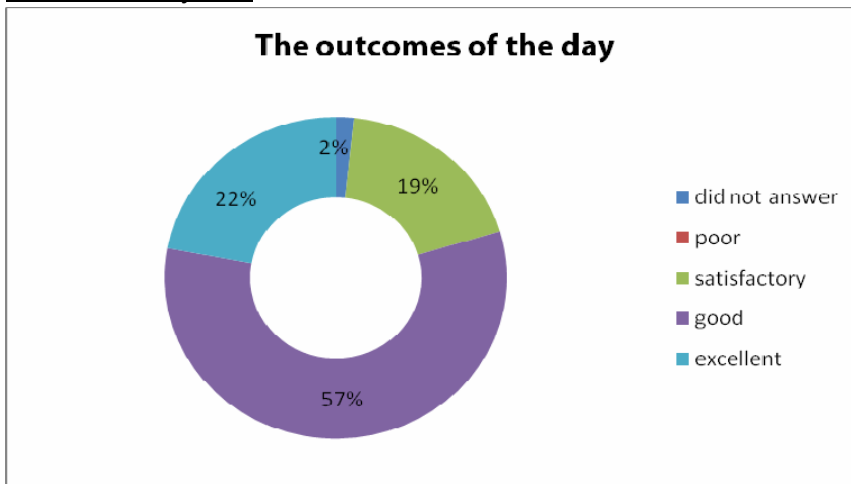
What do you think the GMB wanted from this training?

1. *Appreciation of what is expected of managers.*
2. *Greater sense of ownership and involvement.*
3. *Feedback on our views of management GMB / GMB @ work.*

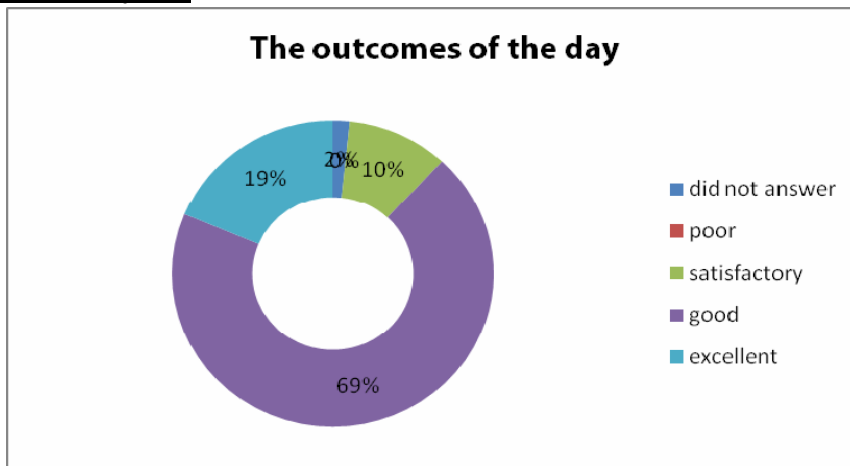
Question 4.



Outcomes day one



Outcomes day two



**Recommendations**

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Following the successful completion of the training there were a number of recommendations designed to take the next steps required of the Union. The steps apply to each team that took part in the training and their application should be generic but with the flexibility required by a federal organisation. The project will be successful in the long run if the Union are able to apply standards and principles such as those outlined below in a way that doesn't compromise other important Union principles. There is a lot riding on the will of the SMT to take recommendations such as these and act together as individuals.

1. Fully endorse SMART team action plans with evaluation. The UMF project outcomes require the Union to develop action plans for each team that has taken part in the training. These should provide a route for each team to achieve better management structures and competence. A team evaluation process needs to be in place to track team progress on this. The federal structure and different positions of each team will be reflected in the individual team plans that are produced.
2. Plan for staff inclusion. There is an opportunity to begin this process via the all staff briefing required as an output from this project. Going forward there needs to be inclusive events that deliver a message of unity of purpose amongst all employees. A trial of GMB@Work training for some staff, to bind them into the strategy, should be attempted and a report delivered to the SMT.
3. Managing performance. Each team should be asked to put together a proposal for improving the systems of performance management in their regions/office. This does not mean the adoption of an appraisal system but simply a concerted effort to find an appropriate way to improve on what already exists in each individual team. The UMF project offers an opportunity for teams to attempt this in the required action plans. This is an opportunity to update current systems and approaches across the Union.
4. Disciplinary procedure. The line management function is different in each of the federal elements of the organisation. Where discipline sits in that function is necessarily different in each of the teams that we worked with in the roll out. Nevertheless the aspiration of the SMT in April was that all line managers should be using the disciplinary procedure. To move this forward each office/region needs to clearly set a timeline for introducing protocols that will allow this to happen.
5. Officer/staff capability. If there is a capability issue that prevents offices/regions from developing the line management structure fully then action plans should be put in place to develop that capability.
6. Officer training. Underpinning much of the above is a consistent development plan for GMB managers. This should include a number of flexible modules

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that can be adapted for each regions/offices particular style of line management

#### **4.4 Concluding the roll out**

The roll out provided an insight into some of the practical problems that the Union has at a national strategic level with its management tier. Some of those issues are cultural and some of them are structural. The steps that need to be taken are those of establishing stronger structures that support a change in the organisations culture. The roll out of management training, underpinned the work that the SMT had taken in reaching out to the management tier to bind them closely to the decision making structure of the Union. The exercise has set out an expectation on the management tier of the organisation to fulfil the line management role and to take responsibility for delivering the strategy of the Union. There are issues; addressing the management tier as a whole is difficult because of the federal nature of the Union. Roles differ, systems differ and policies are interpreted differently. Working in that reality means a concerted effort from the SMT to ensure that all parts of the federal structure are working towards the same goal of improved management. The consistent management development model established through the roll out combined with guidance produced for teams has contributed to a start of that process. The approach to development plans is set out in the next section, it reflects that achieving the goal will not be through a one size fits all approach but a flexible approach that recognises difference.

### **5. Identification of SMART teams objectives**

#### **5.1 Action planning**

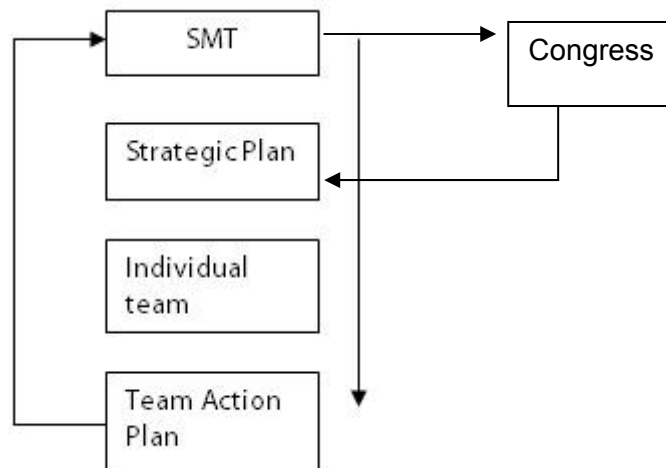
The strands of the project were designed to lead to a natural phase of action planning for the teams involved in the training and for the Union as a whole at a strategic level. Action plans for the teams followed on from the training sessions, they set out a series of steps for each of the teams to apply and further develop the management structures and standards established through the project.

Project benefits will be realised through the implementation of the action plans, turning the learning and work into tangible outcomes across the organisation. The responsibility for the action plans lies with the SMT who individually represent and are responsible for the management of the teams who attended the roll out of training. The SMT are also responsible for developing the annual strategic plan for the Union that is submitted to Congress for approval – ‘A Framework for the Future of the GMB’ each year. The annual strategic plan along with the significant learning from the project provided the basis for establishing team plans. The project team prepared a briefing for SMT members detailing an approach to implementation of the strategic plan that encompassed the learning from the project. Fig 5.1 indicates the

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model used to establish team action plans; it is underpinned by a cyclical annual review process.

Fig 5.1



The Union is a federal entity and the federal arms have the freedom that the structure affords to implement the learning as they see fit. The recommendations of the report (as outlined in section three of this report) were intended to provide a baseline for the SMT and offer the opportunity to coordinate a response through the guidance to the issues raised. Key to these themes were building on GMB@Work as a strategy, establishing personnel development in the team, improving communications, and improving the line management function. Underpinning these would be a review process established for each team to measure progress against the action plan. In support of the guidance were the materials and the report that were produced for the roll out of training, offering a sense of where best practice was lacking and information on how it could be improved. In Box 5.1 you will find a summary of the guidance note agreed by the SMT.

Box 5.1

**Identification of SMART Objectives for the identified teams in the nine regions, head office and NAU with action plans for achievement of objectives.**

**Action (Regions/Head Office/NAU) –**

A. Each team complete an action plan pro forma (**Appendix Two**)

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## 5.2 Review of submissions

The Action plans contained three central elements that needed to be addressed by each team; strategic goals linked to GMB@Work; improved management function as provoked by UMF training; and monitoring and evaluating against timescales. In this section of the report a selection of the team plans are highlighted, some strong and some less so. It aims to provide a flavour of how the teams, led by SMT members, responded to the brief. The materials does illustrate difference but it also illustrates a commitment to the strategy and to improve management function in line with the UMF project.

GMB strategy

Team	Strategy overview
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Team	Strategy overview
National Admin Unit	<ol style="list-style-type: none"> <li>1. Deliver highest quality support services by continually reviewing and developing our systems and processes</li> <li>2. Provide monthly consolidated financial accounts and regular reports to CEC and SMT to assist in monitoring Income and Expenditure performance against budgetary targets</li> <li>3. Provide accurate membership statistical reports that will enable SMT and CEC to monitor performance against targets and to redirect resource as necessary</li> <li>4. Ensure the financial resources are available by reviewing and improving our credit control function to maximise our cash flow position</li> </ol>
Midland and East Coast	<ol style="list-style-type: none"> <li>1. Facilitating new recruitment projects in Wilkinson's, Local Authorities, and NHS with ROT</li> <li>2. Consolidating and growing existing branched increasing overall branch membership to 57,000</li> <li>3. Targeted GMB@Work training for 22 branched</li> <li>4. Reviewing, updating and re-implementing best practice for Staff and Officers</li> </ol>
Yorkshire and North Derbyshire (Southern Area)	<ol style="list-style-type: none"> <li>1. Increase membership to 60000 by December 2010</li> <li>2. Regional monthly targets of 766 new members</li> <li>3. Recruiting 235 per area team per month</li> <li>4. 295 per area team per month where there is a specific recruitment week with ROT/Conversion learning team</li> <li>5. Specific target areas: - School based staff/Southern Cross Healthcare/Security and airports/sports section professional rugby league players/Local Government and Health Services/Greenfield and non unionised companies.</li> <li>6. The whole team has been specifically trained and understand the principles of GMB@Work and have agreed enthusiastically to specifically target their time to achieving its aims and goals</li> </ol>

Team	Developing the management function
National Admin Unit	<ol style="list-style-type: none"> <li>1. Making all employees at the NAU aware of the GMB@Work philosophy</li> <li>2. Setting targets and goals for each employee that reflect GMB@Work strategy</li> <li>3. Encouraging teams to take ownership of their workload</li> <li>4. Creating awareness in team through regular team/department meetings with feedback on activities and performance</li> <li>5. Motivating team and actively rewarding and publicising success</li> <li>6. Providing feedback for all employees through team/department meetings and on a one to one basis at staff evaluations</li> </ol>
Midlands and East Coast	<ol style="list-style-type: none"> <li>1. Consultation on best practice</li> <li>2. Organisers and teams with defined workload</li> <li>3. Creating awareness in teams through half day sessions with feedback</li> <li>4. Providing feedback loops for all employees (one to ones)</li> <li>5. Actively motivating teams and team members</li> <li>6. Setting target and goals that reflect GMB@Work for each employee</li> </ol>
Yorkshire and North Derbyshire	<ol style="list-style-type: none"> <li>1. Monthly one to one meetings with the Senior Organisers</li> <li>2. Quarterly team meetings</li> <li>3. New targets and goals will be set with organisers periodically</li> <li>4. Previous goals and targets will be given consideration with outcomes analysed and recorded in their organising book</li> <li>5. Duties will be rotated with agreement if it is deemed necessary to give individuals new opportunities</li> <li>6. M&amp;E of all strategies</li> <li>7. Training and development for senior managers; organisers;</li> </ol>



	<p>staff and lay officials</p> <p>8. Double loop learning strategy (learn from your learning)</p> <p>9. Communication, open and transparent both vertically and horizontally throughout the region</p>
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Team	Review Process
National Admin Unit	<ol style="list-style-type: none"> <li>1. Director and managers will monitor GMB@work targets and regularly review reporting systems</li> <li>2. Managers will review targets for each employee at regular intervals</li> <li>3. Reports will be produced and reviewed at team and department meetings</li> <li>4. Monitoring of team motivation activities and publication of successes</li> <li>5. Review objectives and performance evaluations (one to ones)</li> <li>6. Managers review action plan with individuals setting targets followed by six monthly reviews</li> </ol>
Midlands & East Coast	<ol style="list-style-type: none"> <li>1. Regional Secretary and Senior Organisers will review regional GMB@Work targets</li> <li>2. Seniors and managers will review targets for each team on ad hoc basis with formal review every six months</li> <li>3. Seniors and managers will produce and implement a strategy encouraging ownership of GMB@Work and track progress</li> <li>4. Regular reporting</li> <li>5. Best practice review by Decemeber 2009</li> <li>6. Recording of one to ones and outcomes</li> </ol>
Yorkshire and North Derbyshire	<ol style="list-style-type: none"> <li>1. Monthly organising reviews with Senior Organisers</li> <li>2. Organising reviews to include workplace audits designed to mearsure membership development, workplace mapping and new activists appointed</li> </ol>

	<ol style="list-style-type: none"> <li>3. A review of each branch within team area to measure branch activity and viability</li> <li>4. Annual training and development review and one to ones</li> <li>5. Quarterly team meetings</li> <li>6. Staff development and training</li> <li>7. The development and adherence to best practice protocols</li> <li>8. The sharing and discussion of team and regional performance indicators such as membership recruitment statistics and training outcomes</li> </ol>
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Teams were asked to provide the overview along with detailed action planning documentation that illustrated the steps in place to achieve the issues highlighted in the overview.

Table 5.2.1 Northern Team extract

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
All Northern Region Staff to be motivated to become multi functional and to work flexibly	To establish a baseline of the skills, abilities, training and development needs to ensure commitment to the GMB@Work culture throughout the Northern Region	Time; skills analysis; training and development opportunities made available	Bill Moran reporting to the Regional Management Team	Through Team briefings; training and continuing development; review of working practices; communication and feedback; to embed GMB@Work principles	Review March 2010

Table 5.2.2 Birmingham and West Midlands

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Career development for staff	Consistent one to one interviews with Line Manager	Ongoing review of training budget and opportunities	Appropriate line manager	Training needs identified and developed	Minimum 6 months
Deliver GMB@Work to staff	Design GMB@Work bespoke course for staff	Organiser Tutor	Regional Organising Team Representative	Service to the regional membership	6 months

Table 5.2.3 Scottish team extract

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Developing Management Structures & Devolved Decision Making	More Responsibility Accountability Making Decisions	Existing	Regional Secretary Senior Organisers Team Leader Department Heads	360° Feedback Process	Ongoing 6 monthly review
Inclusion of Regional Office Staff and Sub Office Staff in GMB@Work	Improved Communications between and across departments Breakdown silos Cross functional flexibility	Existing	Regional Secretary Head of Finance Office Supervisor	Reduce stress Reduced Complaints Inclusive approach Integrated Processes	January 2010 - 2011

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### 5.3 Analysis of submissions

The action planning exercise was coordinated by the SMT members and was directed to reflect the GMB@Work strategic plan and to incorporate management practices into the process and procedures of the organisation. This exercise did not exist in isolation, many teams had action plans or similar procedures established to set corporate targets for teams and individuals these were, to some extent, reflected in the final submissions. The intended benefit was through planning, monitoring and review processes for the team and individuals linked into the wider organisational goal. This has been largely realised, individual teams have different priorities but there is a constant thread throughout of monitoring and evaluating ; reviewing; and renewing targets for individuals and teams set out in these action plans.

That common thread is a reflection of the strength of the current SMT. Even in some of the earlier discussions and sessions of this project with the SMT a commitment to a common 'review' process seemed unlikely. The attempt at action planning and the adherence to a common structure of planning and review establishes that common approach to planning the work of the Union. If the SMT can ensure this is embedded throughout the course of the next six to twelve months that structural approach can become part of the culture of the Union. The SMT has been given a recommendation to pursue the action plans through monitoring and evaluation for each of the eleven teams.

A central theme for this project has been the development of management capability throughout the management tiers to allow better management of strategy and people. In order to achieve that there is a need to recognise the requirement for continual development and support of the management function; the action plans on the whole reference development but are less than specific on how it will be achieved and be supported. An analysis of the action plans as they currently stand would recommend that the SMT offer a specific set of management developmental goals that inform any training or development referenced in the action plans. This will underpin the structural commitment and offer a GMB wide approach\* to 'training and development' (\*this recommendation has already been made to the SMT and is under consideration). Further to that is a specific recommendation around poor performance management and disciplinary procedures that have not been fully referenced or dealt with in this action planning exercise. The SMT must develop a common understanding and process for this element of management and use the new structures to develop managers' capability. This was a clear recommendation and message from the roll out of training and should be fully addressed.

The action plans offer a further opportunity to develop the relationship with managers in the organisation. There is a commitment, facilitated by the UMF project, in these action plans to involve the Senior Organisers and managers in setting the actions for the team. In some instances managers are leading the development for their own area and teams within regions such as Yorkshire and North Derbyshire. That continuing step forward together with the management tier will be critical in the

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implementation phase. A further recommendation from this element of the project is that the SMT collectively commit to further developing and strengthening the role of the management tier in formulation and implementation of these action plans.

## **6 Conclusion**

The programme of work that has been undertaken represents a step shift in how the Union approaches both engagement with and management of staff. The structure of the organisation will benefit hugely in time from the empowerment of the officers with management responsibility. This project has represented an exercise in culture change, potentially the greatest benefit that the Union has derived is the positive dialogue and engagement that that has occurred, and continues to occur, with our Senior Officers. This project has provided the catalyst for the further development of the Union towards a modernised management structure that will grow and develop in time.

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## Appendix One: - A strategic and consistent development plan for the Union

Strategic Development Plan – Based on Framework for the Future of the GMB (2005 and updated 2009 for the General Secretaries report to Congress)

A period of deep reform and change is underway in the way we build our union in the workplace.

Congress 2006 and 2007 adopted the following policies and principles to turn around our decline and re-build the union:

### Key Messages

1. The main cause of our current decline is internal not external. The answer to membership decline lies in our hands but we need to change how we work.
2. Our job is not to manage the decline of the GMB – but to take whatever steps are necessary to halt it and reverse it.
3. We must be clear about what works and what does not work in recruitment. We can identify and eradicate failed recruitment and organising practice from our past
4. To turn membership decline around we need to focus on workplace organisation. Increasing the activity of our membership and giving them a role in building the GMB where they work, mobilising our reps to recruit and organise.
5. Increase union resources spent on recruitment and workplace organisation towards 20% of the total – effectively directed within Regions.
6. Fewer Targets more effectively organised and monitored. Choosing targets by assessing the access we have to workers, the issues they face and potential to gain momentum, involving new members in growing the union.
7. A bigger role in servicing and organising in the workplace for our Reps will be required. New and coherent training and education will be required to equip them with the skills they need.
8. Focus on consolidating membership in existing sites rather than green field. Adopt a systematic approach to consolidation work and ensure all officers and Reps are briefed on what works.
9. Expect every aspect of the GMB operation to make a contribution to membership growth
10. Focus on sustained membership growth rather than competitive sales culture. Integrate recruitment and organising work with industrial issues and workplace organisation. We must end destructive competition on recruitment performance between officers and offices.

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11. We should go out of our way to include Reps, members, and potential members in our organising and servicing work. We must guard against unconsciously displacing Reps or encouraging dependency on full time officials.

#### Regions Performance and Accountability

12. Change performance measurement from league tables to a rolling average figure over the preceding year to replace competition between regions.
13. Each region to contribute to increasing the national rolling average by 2000 per month by increasing its rolling average recruitment figure substantially.
14. The adoption of Regional targets with collective performance measurements

#### Organising Teams

15. To divert resources into organising in each region under the control of a dedicated Senior Organiser.
16. To organise these resources into an Organising Team including an appropriate mix of skills and experience.
17. To require Servicing organisers to allocate regular time (ie one week per quarter) to the Organising Team on a rolling basis, to work on Project Board priorities at the direction of the Senior Organiser.
18. Organising Teams to include RHSO's to assist in identifying consolidation targets.
19. To consciously break with the —Recruitment Team□ sales culture by full integration of the Organising Team into every aspect of regional activity, using servicing work as an opportunity to build membership.
20. To change the entry point for new officers, renaming the Recruitment Officer grade as Organiser.

#### Organising Project Boards

21. A single Organising Project Board in every region to ensure disciplined targeting of resources, with a clear, open and transparent method of selecting projects, regularly reviewed.
22. Organising Project Boards to include collective quarterly numerical targets and be on open display
23. Organising Project Boards to include no more than 6 main projects and the numbers expected to deliver in the quarter – and no more than 5 developmental targets.

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24. Most targets to be consolidation – but in workplaces with membership density below 60% . Above 60% we should expect existing workplace organisation to improve density further – with external support and training.
  25. Consolidation targets to be identified using organisers own workplace maps, and centrally produced information on membership levels, existence of check off and numbers of postholders.
  26. Targets to be prioritised using the Aim Organising Test (Access, Issues, Momentum)

#### Administrative

27. To ensure each local office co-ordinates calls from potential members with allocated organisers to follow up leads within 24 hours.
28. To have an agreed and understood policy on services available to new members joining with pre-dated problems.
29. To adopt a systematic policy of contacting apparent leavers which involves the relevant servicing officer and establishes the scale of the problem of apparent leavers
30. To ensure the shift in resources to organising is understood by front line staff and put across to members.

#### Training

31. Follow on training in workplace organisation to be targeted at reps in consolidation targets. Training to be standardised, based around the 5 key principles and delivery to include organisers involved in the workplace.
32. Regional Training programmes to be reviewed and standardised, shifting the focus from dependency on officers to workplace organisation.
33. Regional training programmes to be open for entry at every level to allow retraining of Reps in targeted workplaces

#### National Performance and Accountability

34. To produce monthly reports of average performance and the trend in each region.
35. To standardise evaluation system for projects into output measures ( members recruited, increase in membership density, Reps coverage) and activity measures (contact time with potential members, workplace activity).

#### Organising Teams

36. To form a National Organising Team from the Senior Organisers appointed to make recommendations to the CEC organisation group on policy, review,



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monitor and manage recruitment work, share good practice and prioritise National organising projects.

37. That this team meet 10 times per year.

#### Organising Project Board

38. To develop a National Project Board on the same basis as in the regions but containing no more than 3 main projects at any one time.

39. To grade national projects into three streams: Stream One where we ask regions to divert some resources towards a common goal and place the project on their project board, Stream 2 where we ask regions to assist in developing a target, and Stream 3 where we launch projects designed exclusively to be run and lead by activists.

40. To produce data to assist in the identification of consolidation targets in regions

41. To produce data to assist in the prioritising of National Projects

42. To construct a clear streamlined decision making process to assess and prioritise National Projects: proposals come to MS or JM, are referred to the monthly NOT meeting for consideration and a recommendation made to JM for action.

#### Training

43. To produce a new Stewards Handbook to assist local reps learn the skills they need to improve workplace organisation – to re-define the role of workplace reps.

44. To use the Reps mailing to re-inforce the workplace organisation message to existing Reps.

45. To standardise training for new reps, follow on training for reps in consolidation targets and training for officers in consolidation techniques.

46. Briefing for all officers in consolidation techniques to be delivered in region, by the SO with support from the NOT and standardised nationally.

#### Administrative

47. To make the arrangements to allow workers to join us online

48. To establish a centralised lead Book in national office to allocate leads to the senior organiser in each region

49. To shorten the time between a TUC lead arriving and a local officer making contact

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We are in our fourth year of implementing the GMB@Work strategy for growth within the union and each of the 38 points has been fully implemented or will be shortly

We remain focussed on helping our members build the power to improve their pay and conditions where it counts – in the workplace. In the process we have rejected quick fixes and short cuts, fluffy toys and gimmicks, gate jobs and employer partnership.

We no longer see recruitment as just giving out leaflets and hoping for the best. Building the union is no longer what someone else does, or the last thing on our list. Recruitment and retention is now everyone's job and everyone's first priority.

Membership continues to grow despite the recession and recruitment remains high. 87,000 new members joined us last year, 20,000 more than in 2004 during the height of the boom. Two years into the recession and we are growing at the rate of 2% a year. Our members are suffering the threat of redundancy in many areas but thousands of workers are turning to us for the first time for the same reason. Because of this we have made great advances in building the union's strength in the Security, Retail, Care and Education sectors; not just in numbers but in Stewards elected and trained.

In these sectors we are better placed than at the start of any other downturn to weather the storm of redundancies and attacks on our members pay and conditions that is underway.

Over the next year we must continue to consolidate and develop GMB@Work further, taking more control of our Stewards training to make it relevant to the reality our members face at work; encouraging all branches to focus on building the unions membership as the best way for existing members to protect themselves and leading the campaign in the workplace for justice, respect and a fair share of the wealth our members work creates or sustains.

Regional Officers through their NOT member will continue to focus on growth making sure every officer is focussed on spotting the opportunities to build the union and is supported in exploiting them.

We need to stay focussed, keep our discipline be ready to stand by workers in any sector who want to get organised. Where our union is this time next year is our responsibility and no-one else's.

So we must stop blaming just the economy, the government, or the greedy bankers for the problems we face, and take control of our own future. Its what we do or don't do in each workplace that will count during this recession.

We must avoid the pessimistic and defeatist rhetoric that did us so much harm in the recessions of the 80's and 90's as a union, and made us seem weaker than we were to working people in the face of the Thatcher and Major attacks.

## Appendix Two – Training Needs Analysis

N.B. The shaded areas are just examples of most important skills - change shading for your own situation. The lowest scores in the most important skills are the development priorities.

Most important skills are normally those which deliver best performance improvement, but importance could also be for legislation or policy reasons.

	Paul McCarthy	Tim Roache	Richard Ascough	Allan Garley	Alex McMillan	Allan Wylie	Tom Brennan	Joe Morgan	Paul Kenny	Andy Worth	Harry Donaldson	Individual name	Individual name	Individual name	Individual name	Individual name	Individual name	team/group/dept. totals	team/group/dept. averages
<b>SMT Management Skills</b>																			
1	7	8	10	7	7	7	6	7	4	8	6							77	7.0
2	7	8	6	8	8	7	9	7	8	8	7							83	7.5
3	8	9	5	9	8	7	8	8	7	7	8							84	7.6
4	5	6	2	6	7	6	2	5	4	5	6							54	4.9
5	7	7	8	6	7	8	7	7	7	8	6							78	7.1
6	5	5	6	7	7	7	4	4	3	6	8							62	5.6
7	7	6	7	8	7	8	6	8	6	6	7							76	6.9
8	9	7	8	8	9	10	10	9	9	8	6							93	8.5
9	7	10	10	8	8	8	8	8	9	8	7							91	8.3
10	9	9	9	9	8	6	9	6	6	6	8							85	7.7
11	7	8	9	9	9	9	7	7	8	6	6							85	7.7
12	8	10	8	8	7	8	9	9	9	7	8							91	8.3
13	7	7	10	8	8	8	8	10	9	9	6							90	8.2
14	7	6	6	8	8	8	6	7	6	8	7							77	7.0
15	9	6	10	8	9	8	7	8	6	6	7							84	7.6
16	7	5	10	7	7	7	7	8	7	8	8							81	7.4
17	7	9	9	8	8	7	8	9	6	10	7							88	8.0
23																		0	##
24																		0	##
25																		0	##
26																		0	##
27																		0	##
	123	126	133	132	129	121	127	114	124	118	0	0	0	0	0	0	0		
	7.2	7.4	7.8	7.8	7.8	7.6	7.1	7.5	6.7	7.3	6.9	##	##	##	##	##	##		

This analysis is designed to show collective training needs and priorities and also the relative training needs of individuals. For organisational analysis you can use this tool to consolidate and show departmental totals instead of individual names. Use this analysis with the skill assessments (2nd view scores). Use graphs from this analysis to show the results at a glance. More information at [www.businessballs.com](http://www.businessballs.com).

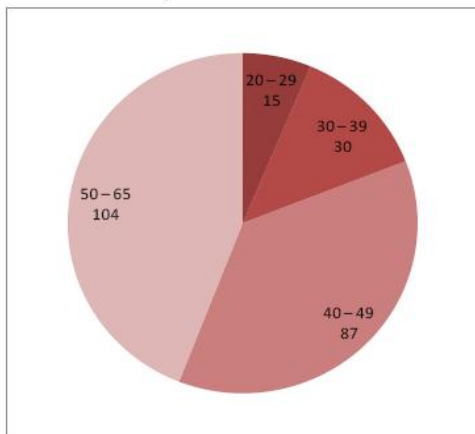
## Behaviours, Attitudes and Personal Style

	Paul McCarthy	Tim Roache	Richard Ascough	Allan Garley	Alex McMillan	Allan Wylie	Tom Brennan	Joe Morgan	Paul Kenny	Andy Worth	Harry Donaldson	individual name	individual name	individual name	individual name	individual name	individual name	team/group/dept totals	team/group/dept averages
Striving for new skills, knowledge, experience and personal development.	7	6	8	6	6	8	9	8	6	7	9							80	7.3
Taking personal responsibility to resolve problems, even those not of my own making.	8	8	9	8	7	8	9	8	9	8	10							92	8.4
Understanding the way people really feel, beyond what they seem to be saying.	7	8	6	8	7	7	7	7	6	7	8							78	7.1
Developing positive relationships, co-operation with, and supporting my colleagues.	7	10	7	8	7	7	8	6	7	8	8							83	7.5
Being a self-starter, self-motivated, keeping focused and productive.	8	9	10	8	7	8	10	9	10	8	9							96	8.7
Planning how to achieve my unions and personal goals.	9	7	8	8	6	9	9	8	8	6	8							86	7.8
Handling stress, conflict and pressure in a positive way.	9	8	10	8	7	8	9	6	9	6	9							89	8.1
Managing upwards and sideways (my managerial superiors and my peers).	8	9	8	7	7	8	6	7	8	6	6							80	7.3
Contributing positively to team/company morale and spirit.	8	10	7	8	7	8	8	6	7	7	8							84	7.6
Seeking and picking up responsibility that I see waiting to be filled.	8	6	10	6	7	9	9	5	7	7	6							80	7.3
Coming up with recommendations and suggestions, more than asking for answers.	7	7	8	7	7	8	7	6	5	8	7							77	7.0
Prioritising, planning and organising the balance between work and home life.	4	4	8	5	5	8	5	5	5	4	4							57	5.2
Using integrity and ethics in my judgement about work and organisational issues.	8	8	10	7	7	8	10	8	6	8	9							89	8.1
	98	100	109	94	87	104	106	89	93	90	101	0	0	0	0	0	0		
	7.5	7.7	8.4	7.2	6.7	8.0	8.2	6.8	7.2	6.9	7.8	##	##	##	##	##	##		

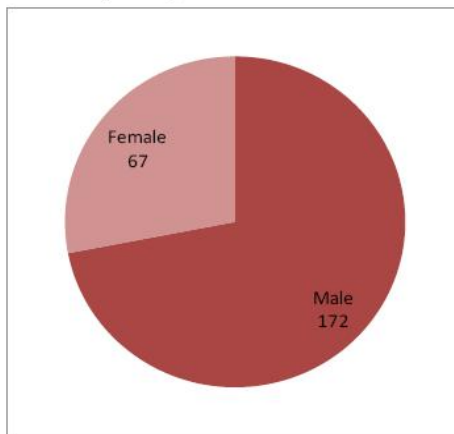
## Appendix Three – Edgbaston Results

### 1. Demographic data

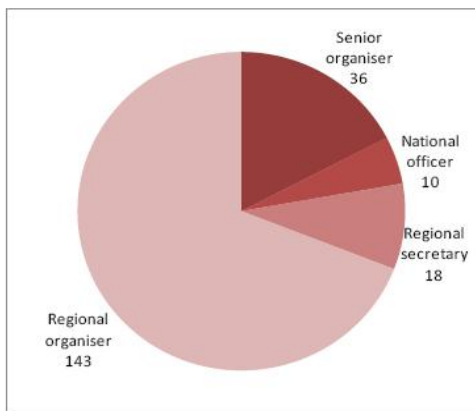
How old are you?



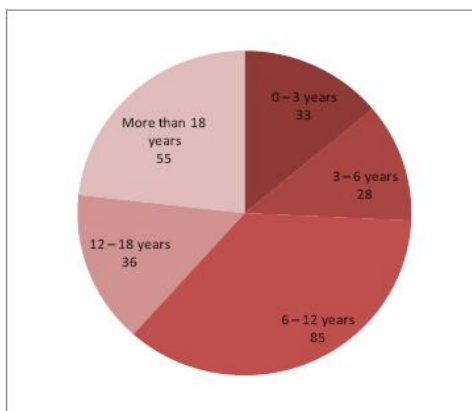
What is your gender?



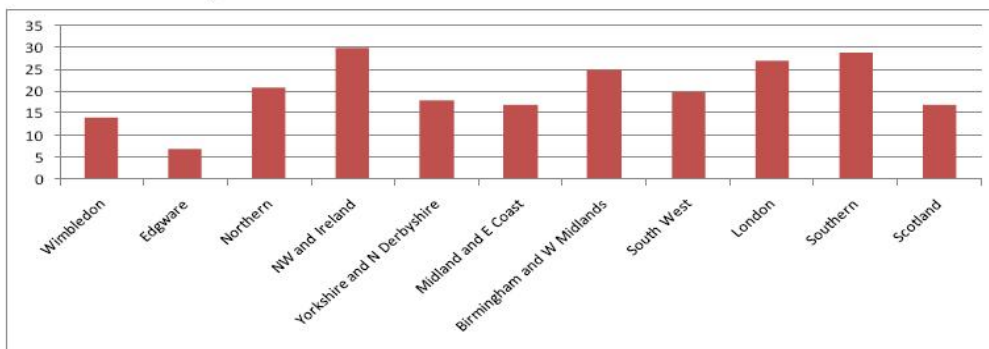
What is your job title?



How long have you worked for GMB?

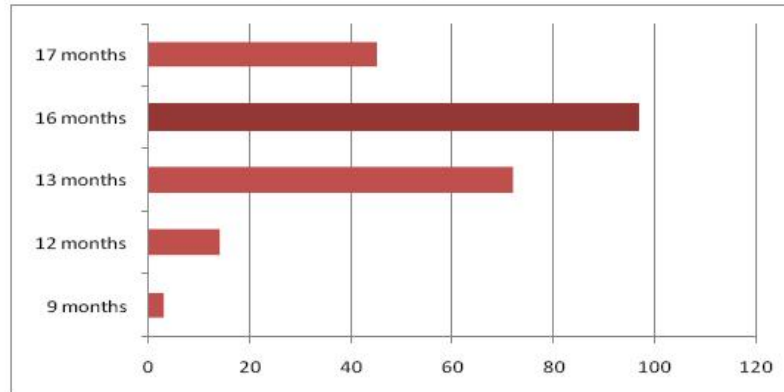


Which office do you work in?

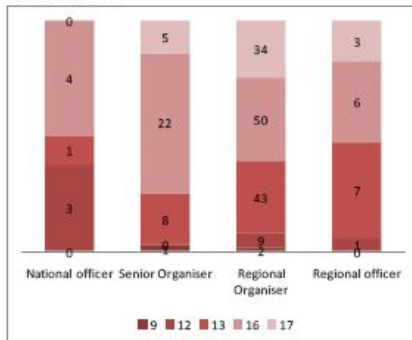


## 2. Knowledge of GMB@Work

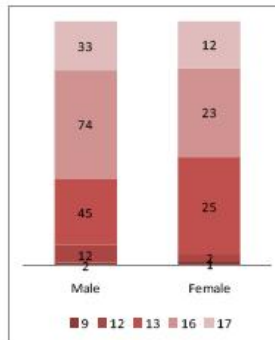
Over the last 18 months, how many saw an increase in membership?



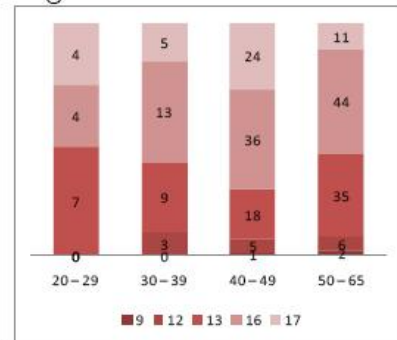
Job title



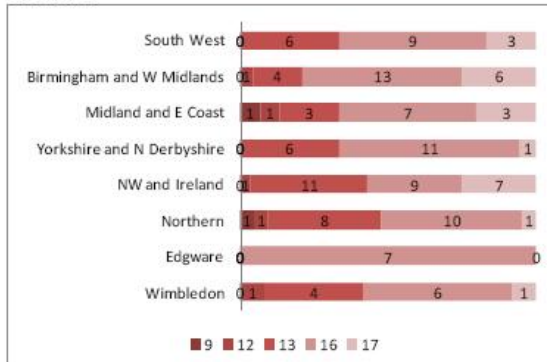
Gender



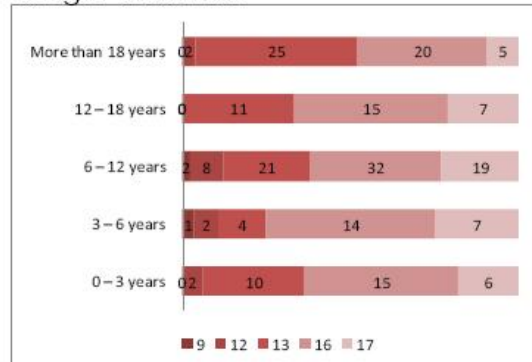
Age



Office

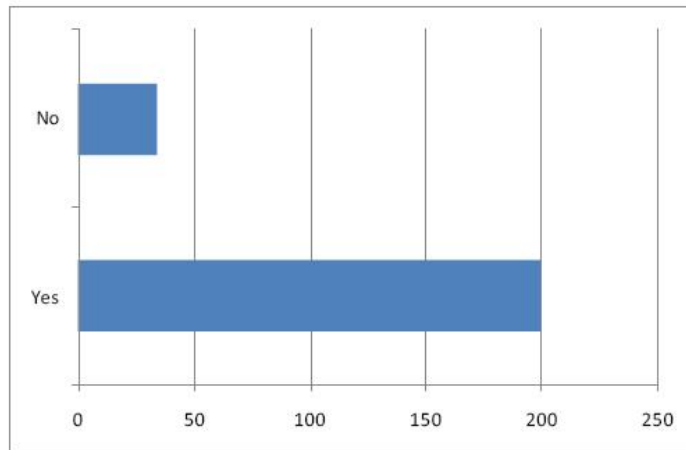


Length of service

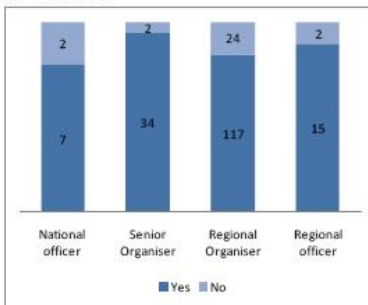


Knowledge in this area was generally good, with the majority of respondents either giving the correct answer or one month out. There were few statistically significant differences between groups.

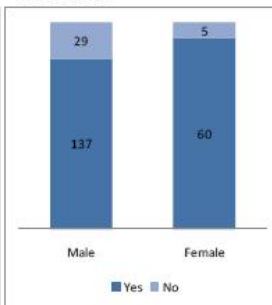
**Have you been involved in supporting your workplace organising plans following GMB@Work training?**



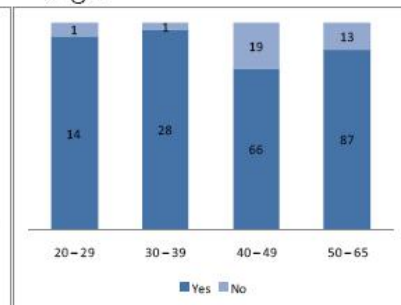
**Job title**



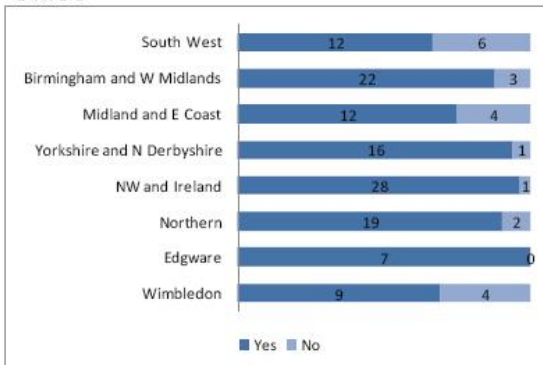
**Gender**



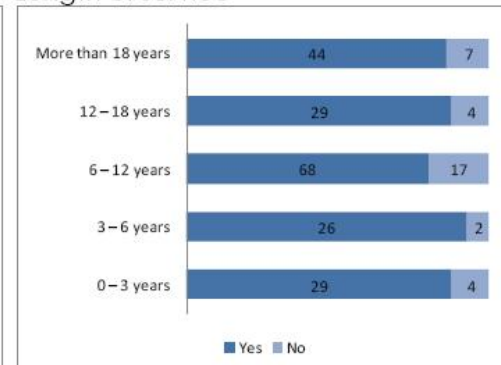
**Age**



**Office**

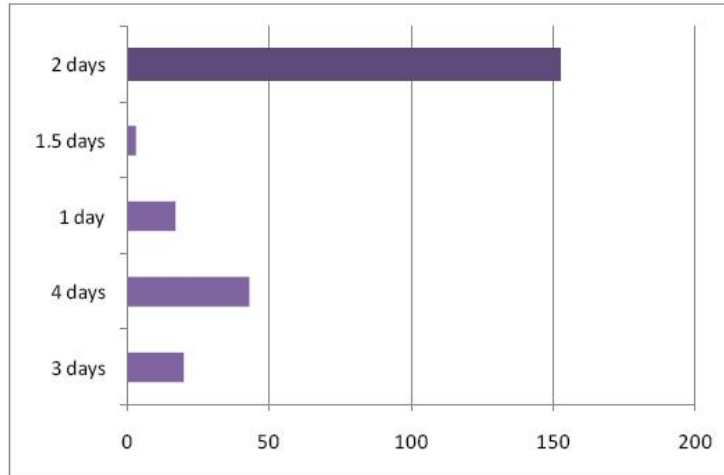


**Length of service**

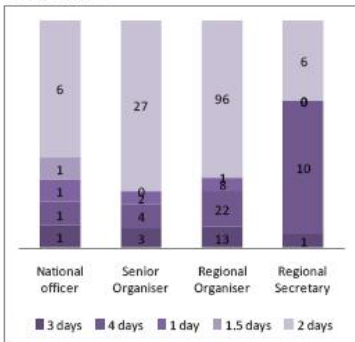


*The majority of employees had been involved in supporting workplace organising plans. This applies even to those who had been in post for a relatively short amount of time.*

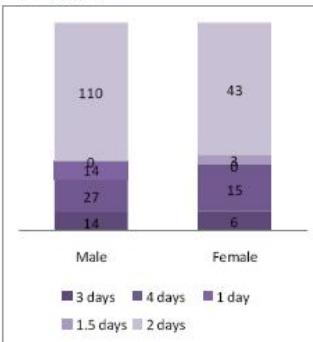
How many days is the GMB@Work training course for new organisers?



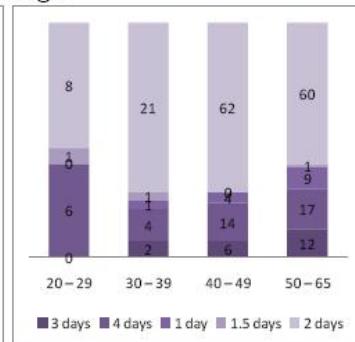
Job title



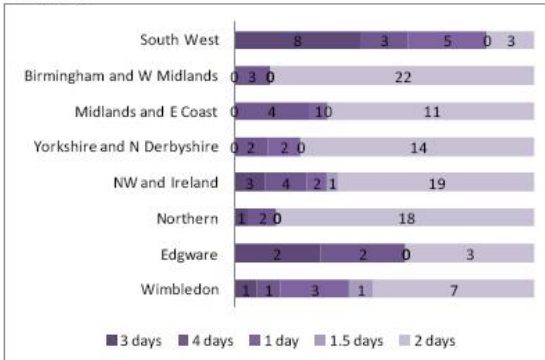
Gender



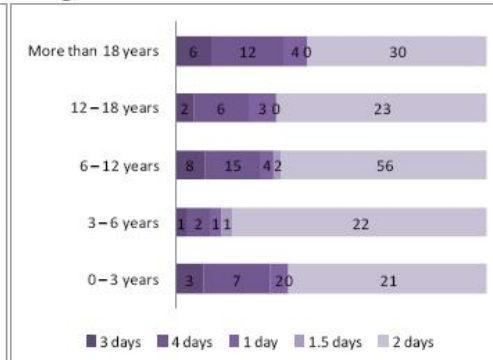
Age



Office



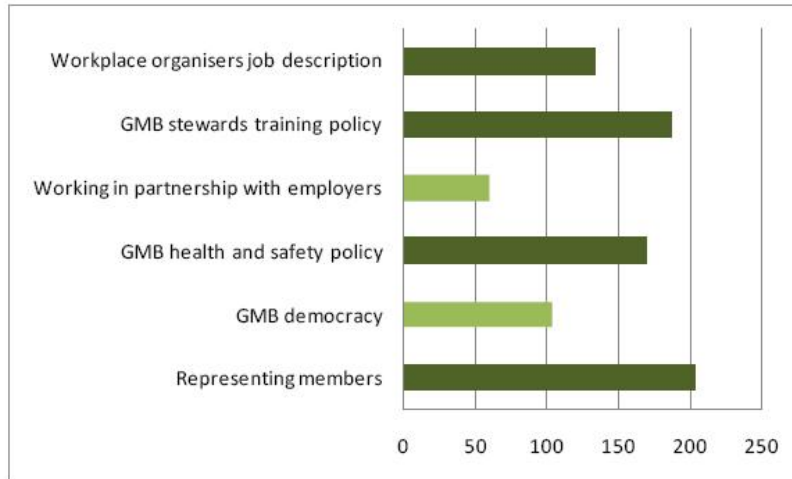
Length of service



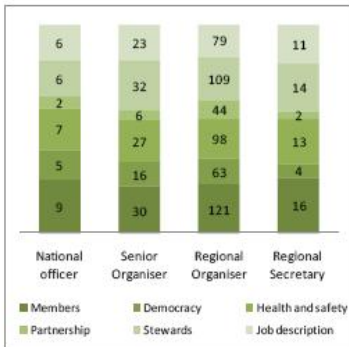
Knowledge levels are again relatively high across the board. The groups which were less likely to get the question right are fairly small and the difference statistically insignificant.



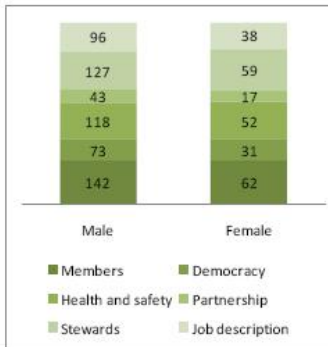
Which of the following policies and guidance are included in the GMB@Work toolkit?



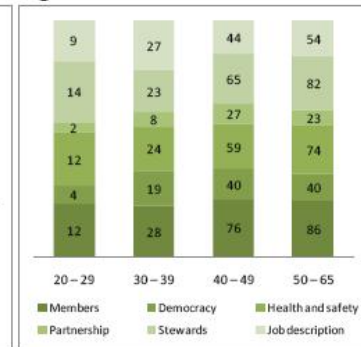
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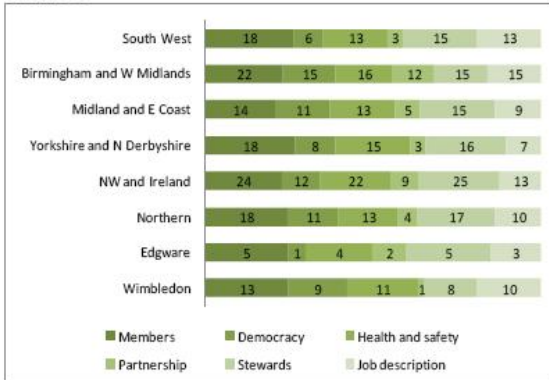
Gender



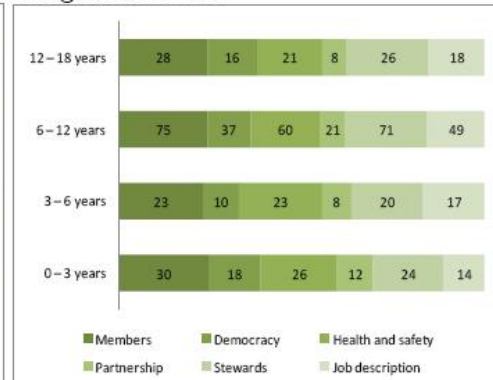
Age



Office

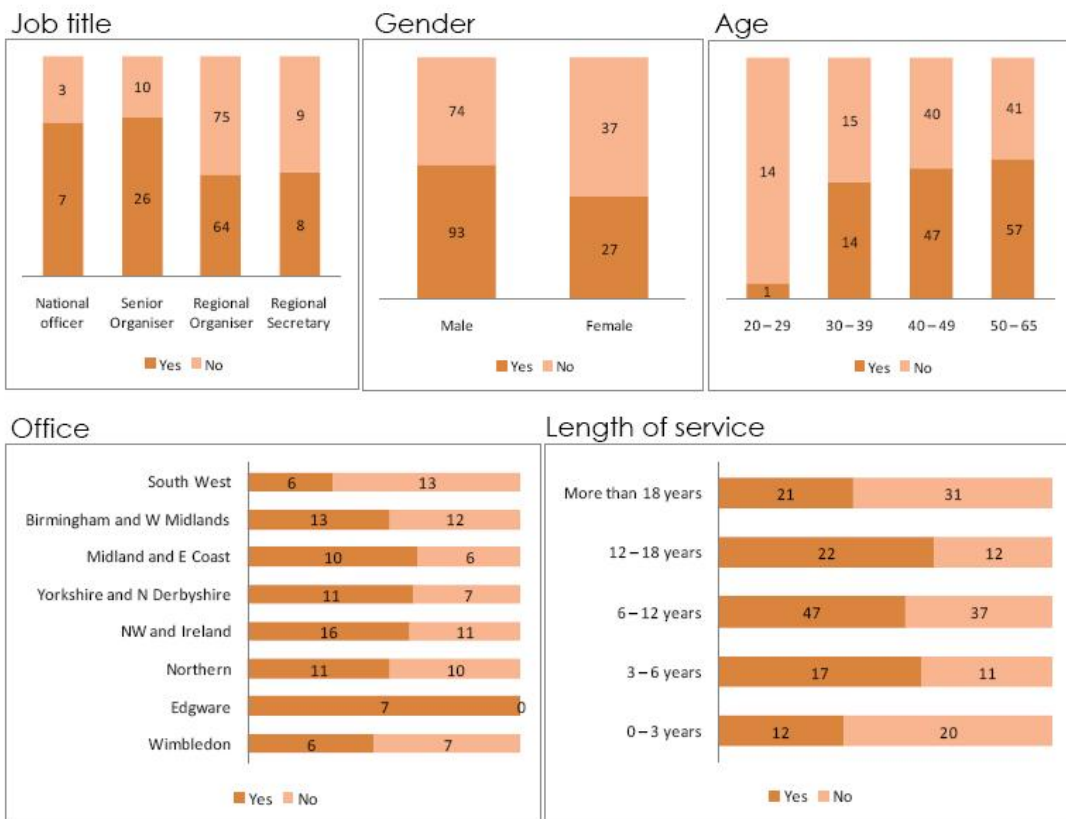
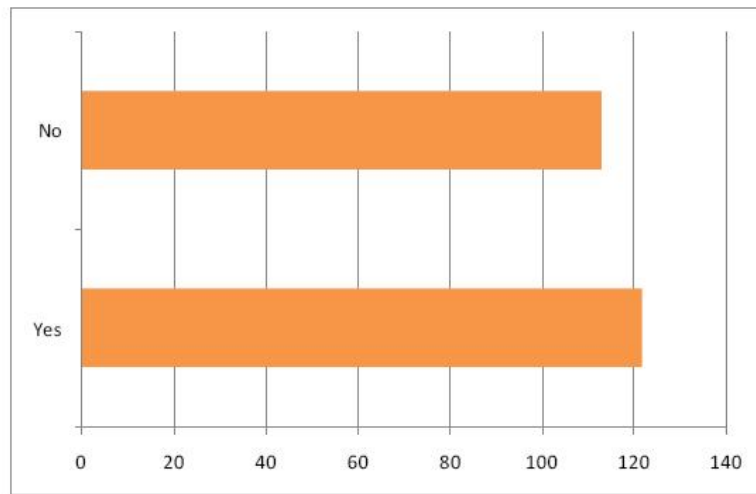


Length of service



This is a relatively difficult question, and it is encouraging that the two wrong answers were selected least often. Members who had been in post for the shortest amount of time were most likely get the answer wrong: this is unsurprising as some will not be entirely familiar with the toolkit yet.

**5. Have you ever organised and run a workplace training course on workplace organisation as a GMB officer?**

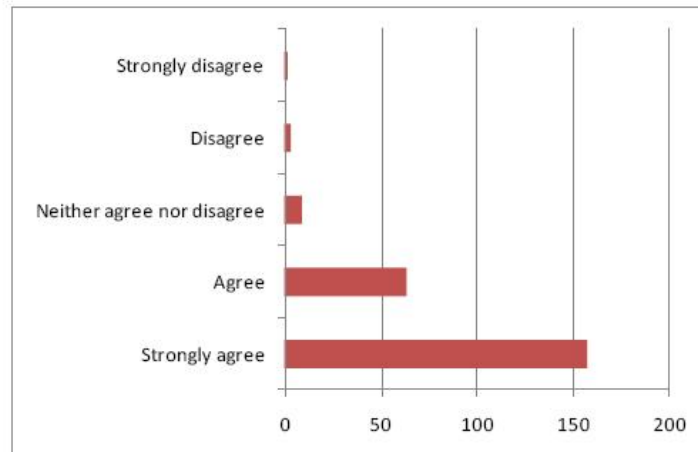


*A slight majority of members had been involved in running training courses. Unsurprisingly, younger members of staff are less likely to have been involved, and regional organisers are less likely than other grades.*

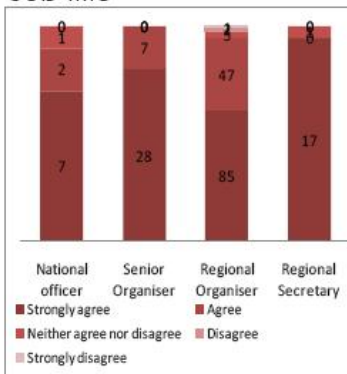
### 3. Opinions of GMB@Work and the GMB

On a scale of 1—5 (one: strongly agree; five: strongly disagree), how far do you agree that

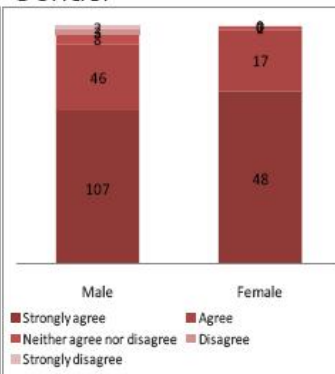
**“GMB@Work has been a positive step for the union”?**



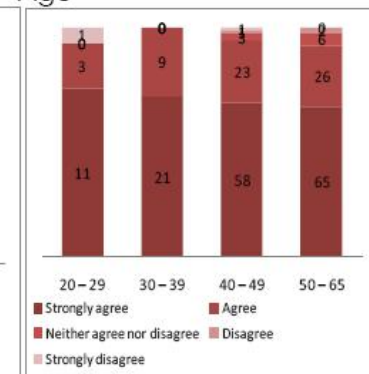
Job title



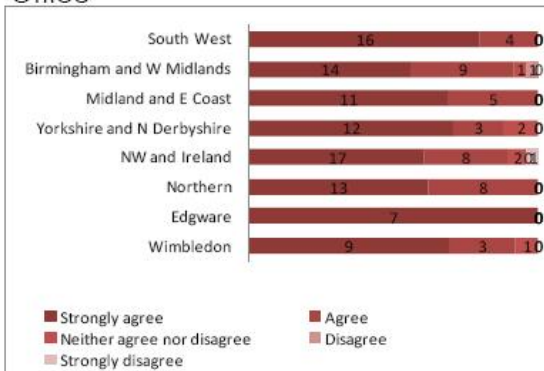
Gender



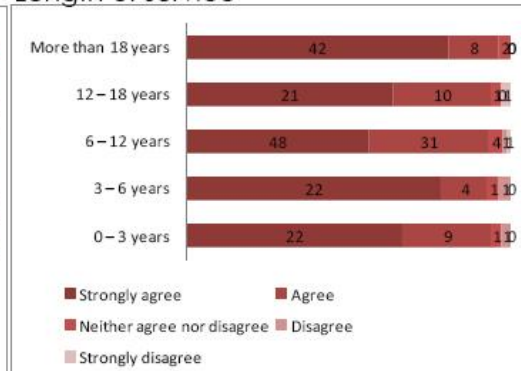
Age



Office

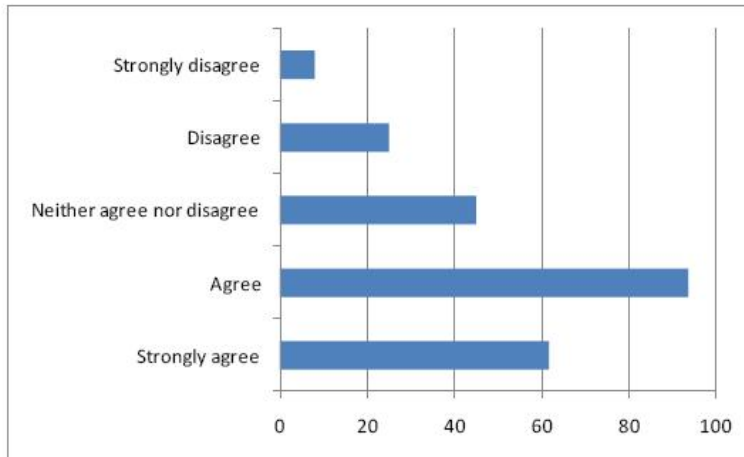


Length of service

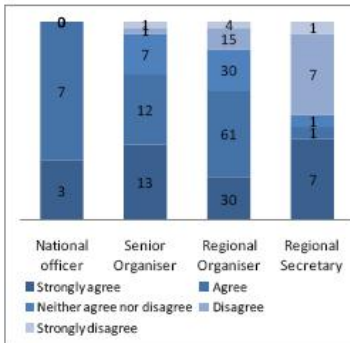


Members are almost unanimous that GMB@Work has been a positive step, with 94 per cent either agreeing or strongly agreeing. This high figure is reflected across all demographic groups in the organisation.

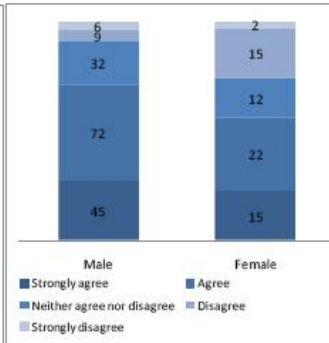
On a scale of 1—5 (one: strongly agree; five: strongly disagree), how far do you agree that  
**“GMB @Work targets are the most effective way of encouraging and measuring our success”?**



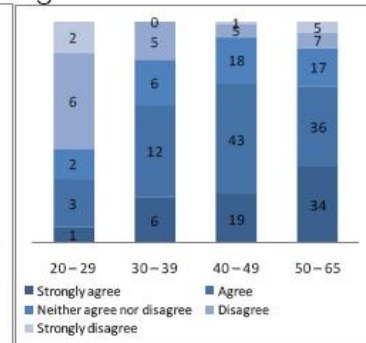
Job title



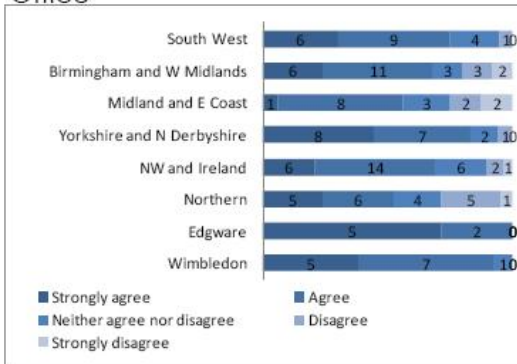
Gender



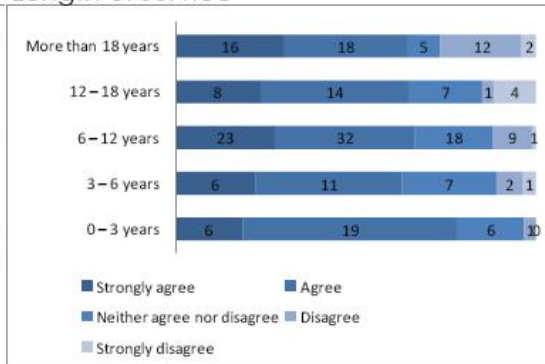
Age



Office



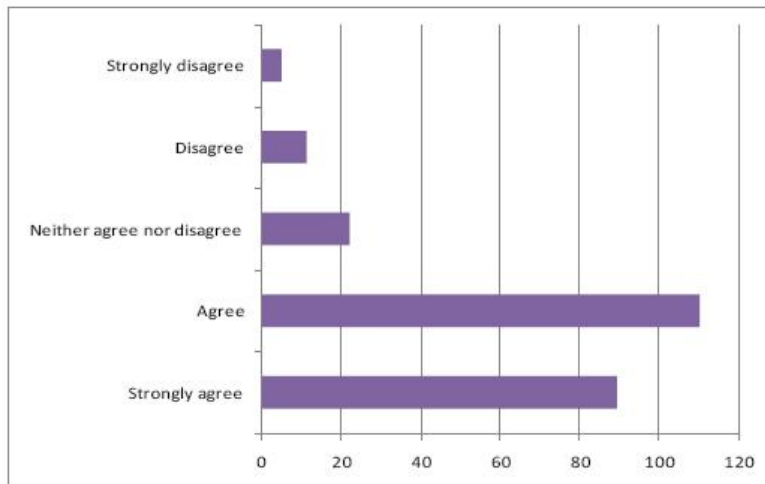
Length of service



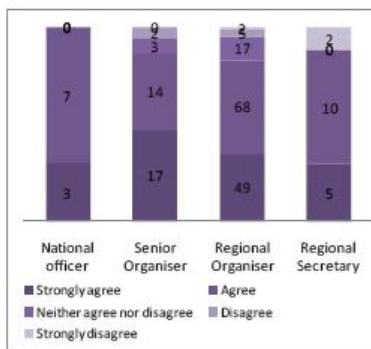
The majority of members support the use of targets to ensure success, with two thirds either agreeing or strongly agreeing with the statement. There is some divergence from this view, but it does not appear to be concentrated in particular offices or among particular groups of staff.

On a scale of 1—5 (one: strongly agree; five: strongly disagree), how far do you agree that

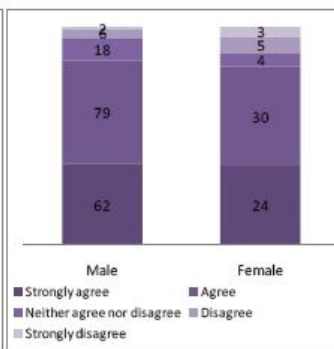
*“The GMB is a progressive union that is working smartly for workers in the UK”?*



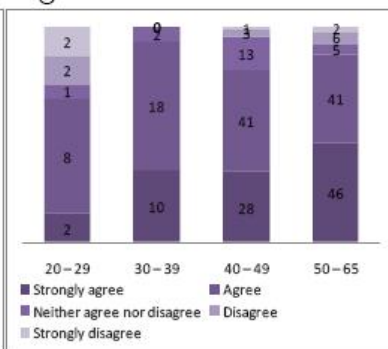
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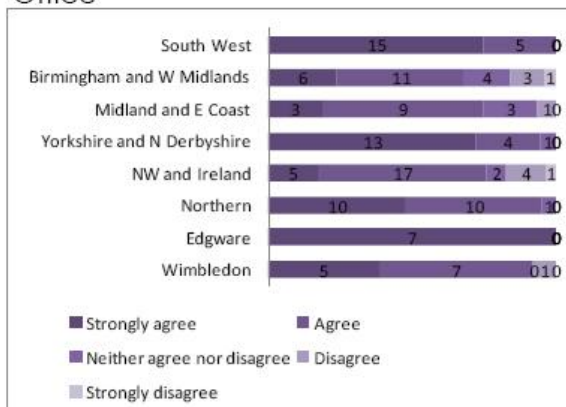
Gender



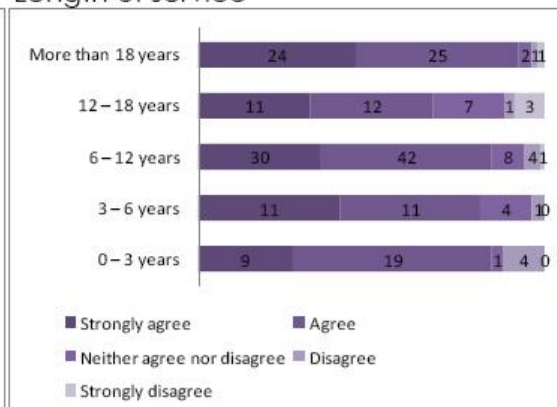
Age



Office

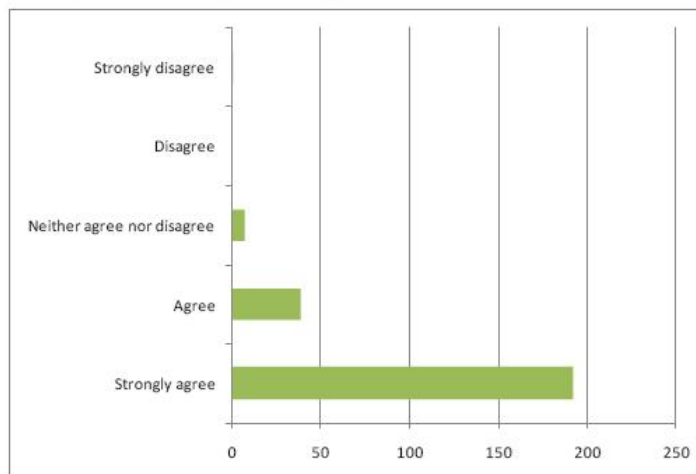


Length of service

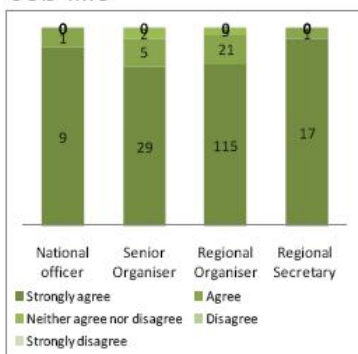


Most members agree that the GMB is a progressive union and ‘working smartly’. Once again, disagreement with the statement is not concentrated in any particular areas.

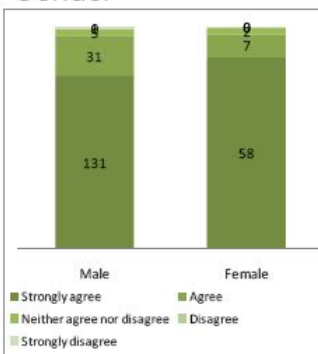
On a scale of 1—5 (one: strongly agree; five: strongly disagree), how far do you agree that  
 “GMB can only survive by ensuring that workers in the UK are organised”?



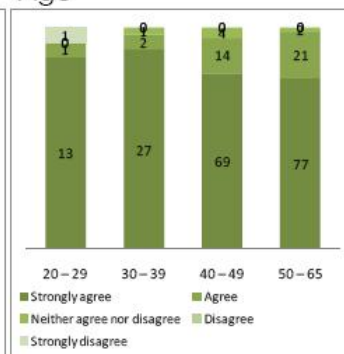
Job title



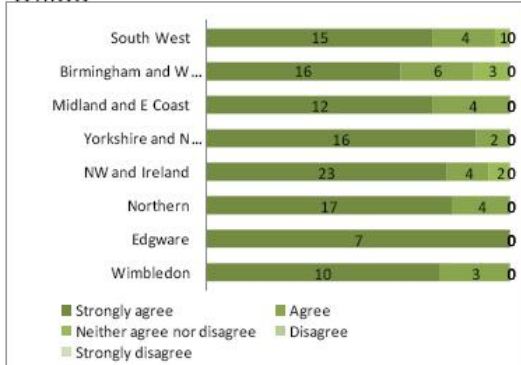
Gender



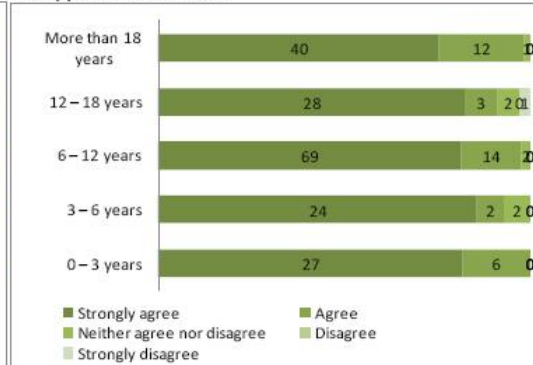
Age



Office

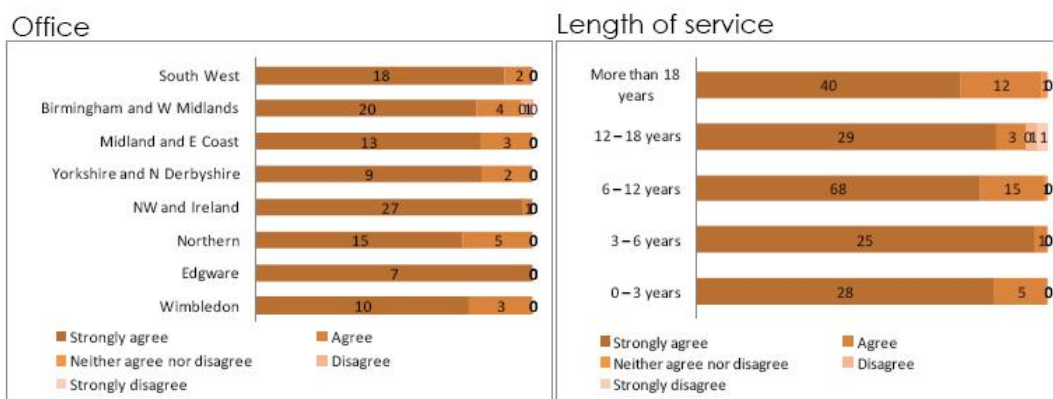
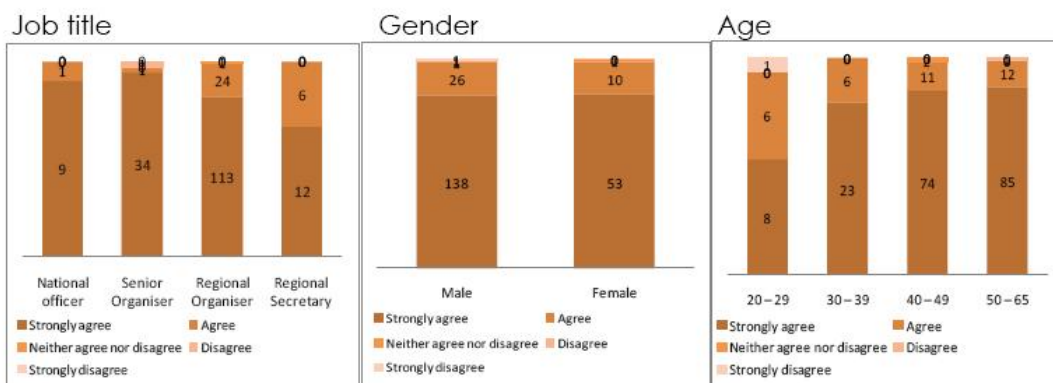
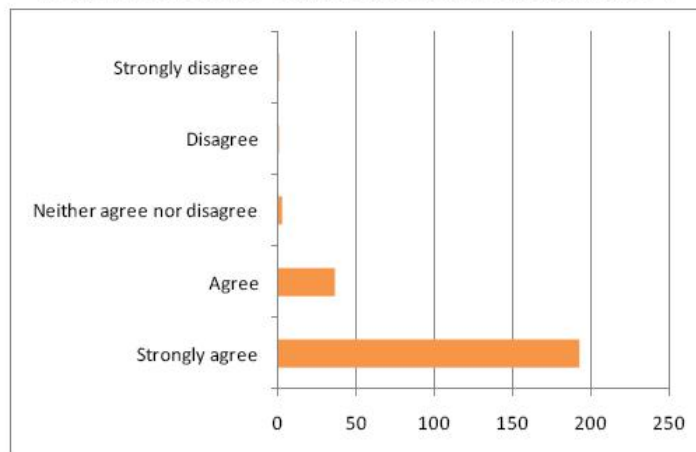


Length of service



Members are almost unanimous in their belief that ensuring that UK workers are organised is key to the GMB's survival.

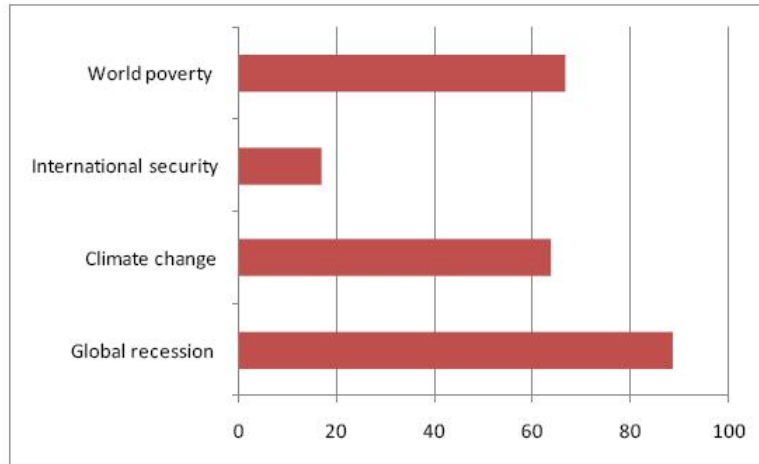
On a scale of 1—5 (one: strongly agree; five: strongly disagree), how far do you agree that  
 “The role of reps in the workplace needs to be strengthened to ensure the GMB delivers excellent organisation in the workplace”?



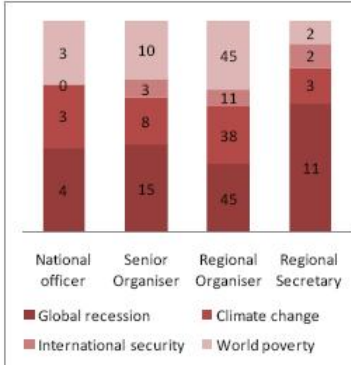
96 per cent of the audience agreed or strongly agreed that the role of reps needed to be strengthened—not surprising given the make-up of the audience.

## 4. Biggest challenges

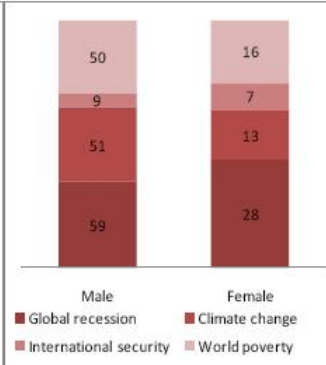
What are the biggest challenges facing the world?



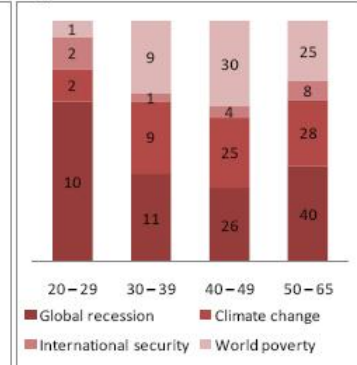
Job title



Gender



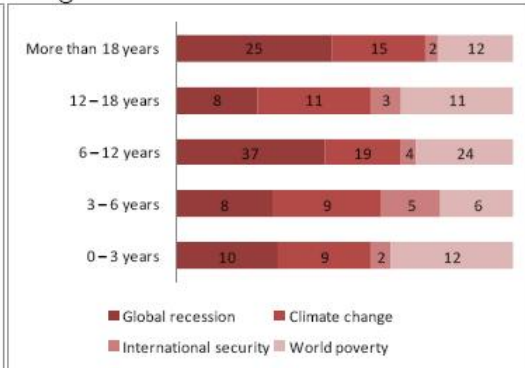
Age



Office



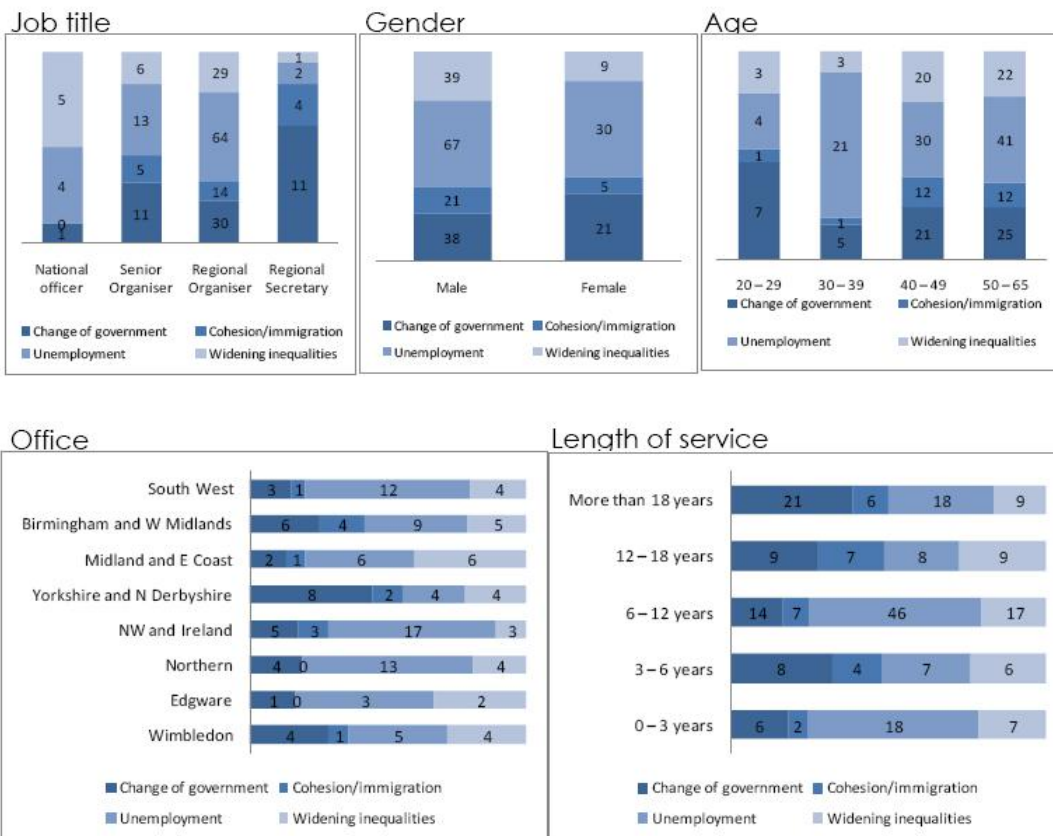
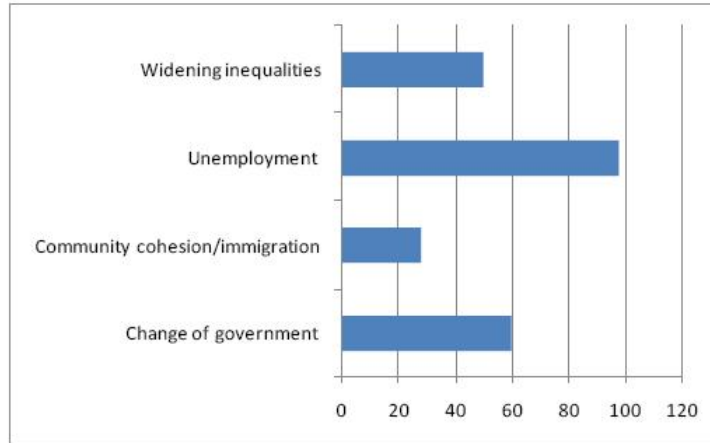
Length of service



GMB members are concerned about financial problems, with poverty and recession the greatest areas of concern. International security was seen as less important than would have been expected a few years ago.

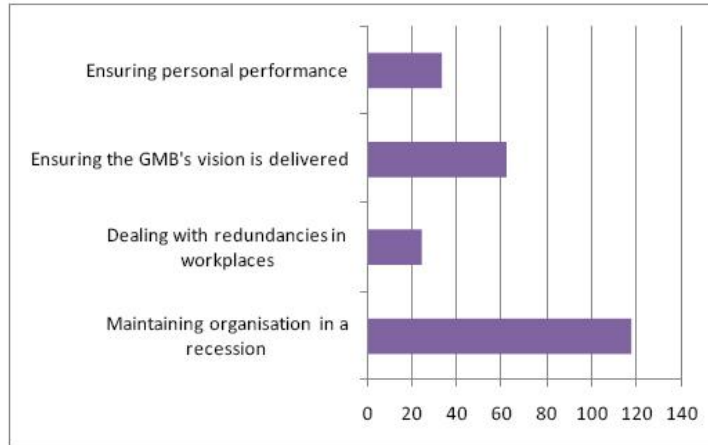


### What are the biggest challenges facing the country?

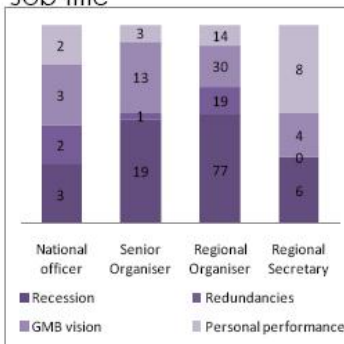


Concern about the impact of recession is also reflected in this question, with members particularly concerned about unemployment. This is most likely to be true of regional organisers, probably because their roles often bring them into contact with individuals who fear redundancy.

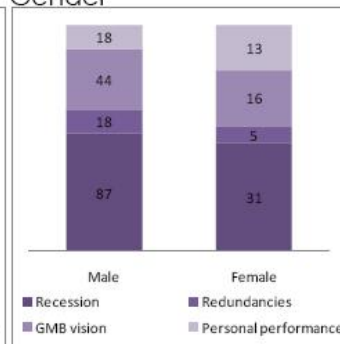
### What are the biggest challenges facing you?



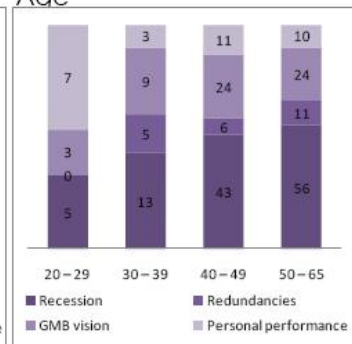
#### Job title



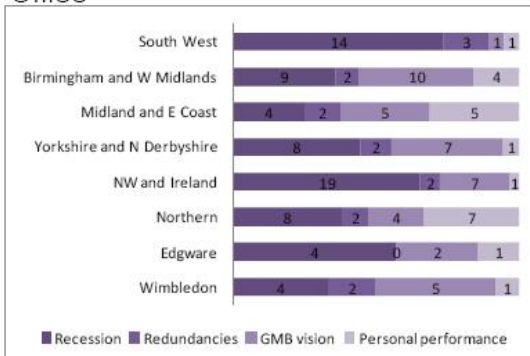
#### Gender



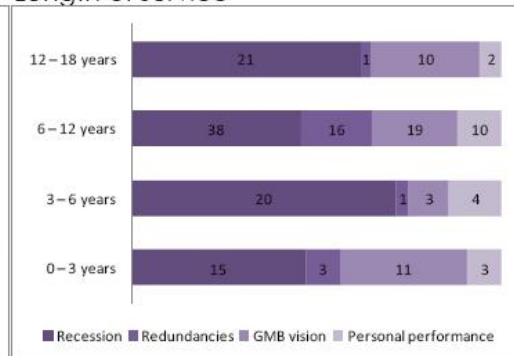
#### Age



#### Office

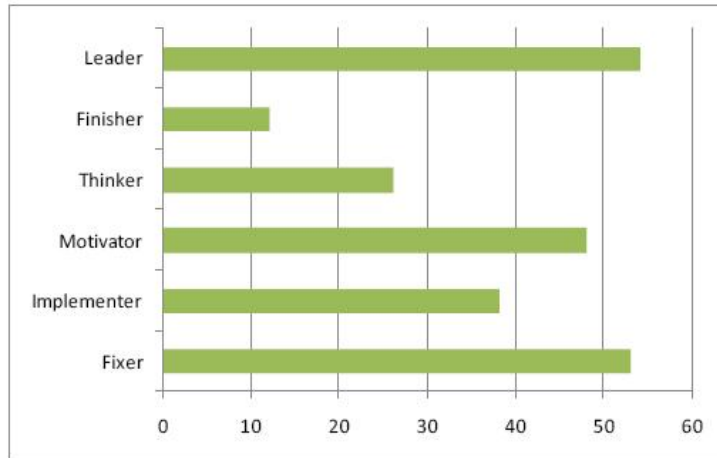


#### Length of service



On an individual level, members are again concerned about the impact of recession. The proportion who feel that this is the greatest concern rises with age, implying that those who have worked through recessions in the past are particularly conscious of the problems that this can cause.

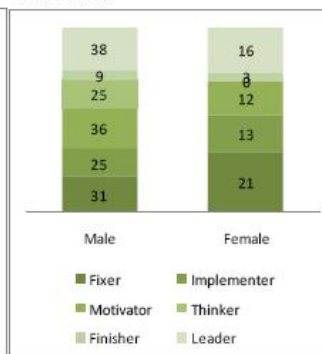
### What type of person would you say you are?



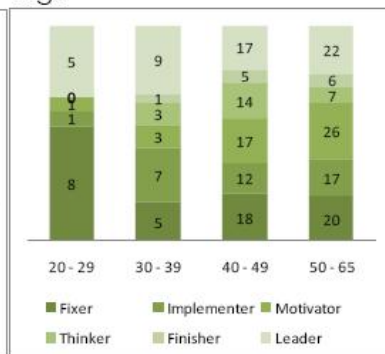
#### Job title



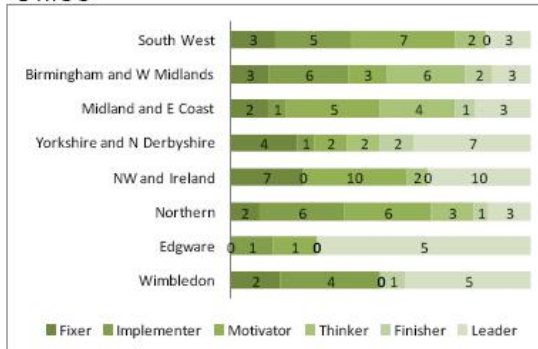
#### Gender



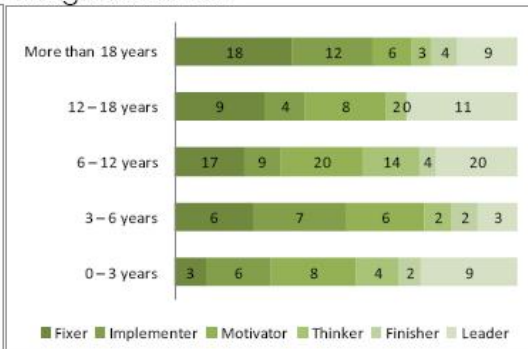
#### Age



#### Office



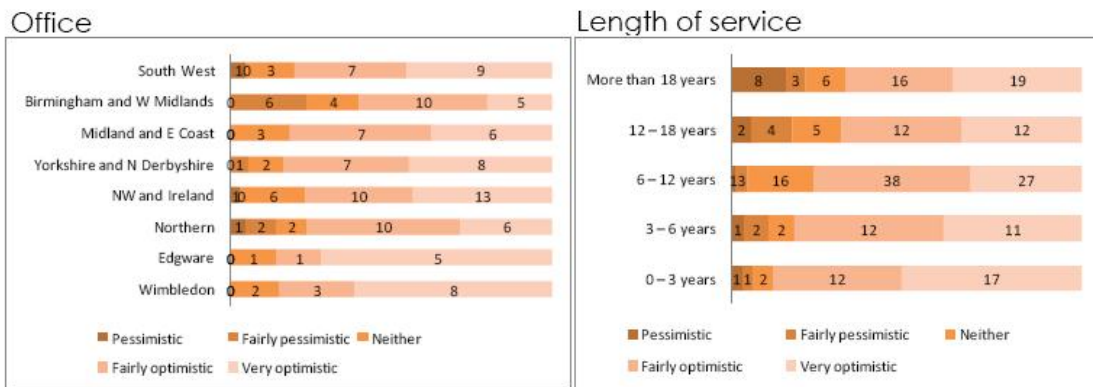
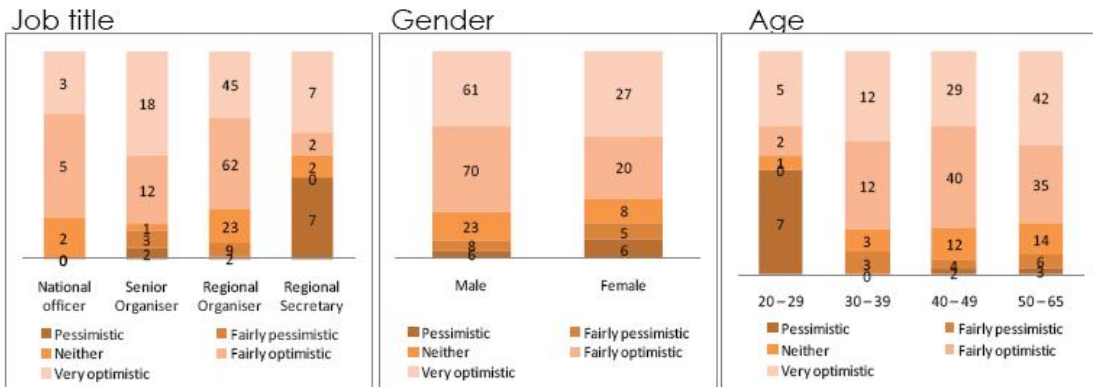
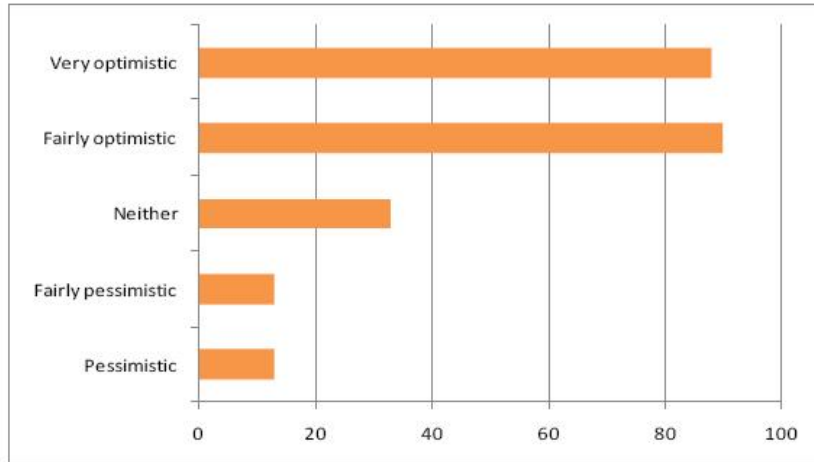
#### Length of service



Self-perception of personality type is fairly constant across offices and demographic profiles. National officers and senior organisers are disproportionately likely to consider themselves to be leaders, reflecting their more senior roles.

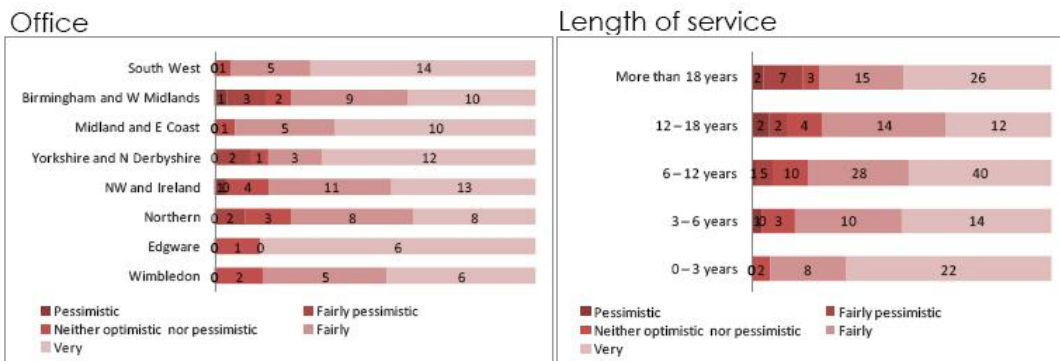
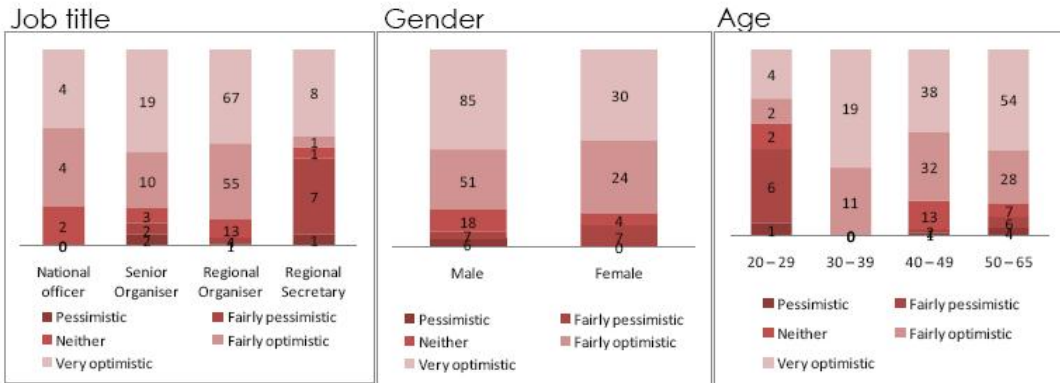
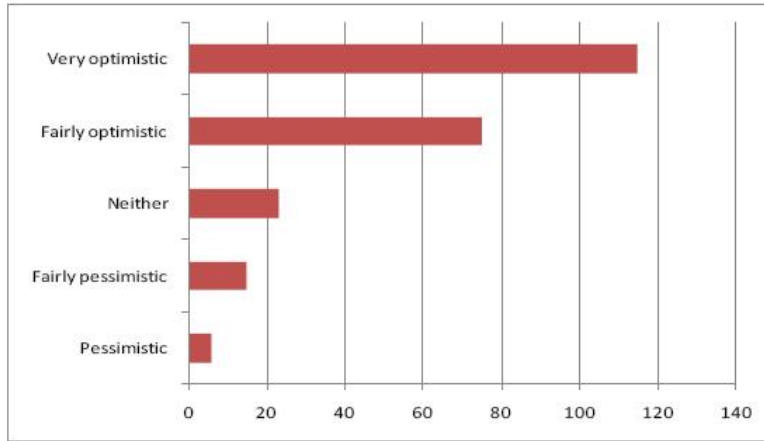
## 4. Levels of optimism

On a scale of 1 to 5 (1—pessimistic; 5—very optimistic)  
How optimistic are you about the future of organising in workplaces?



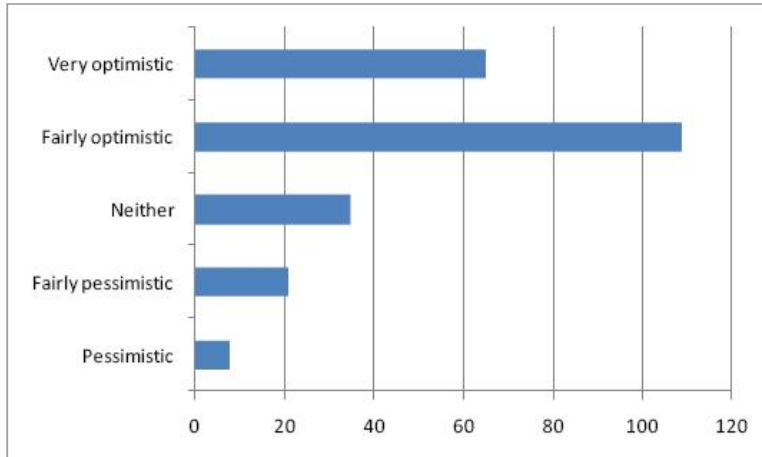
Although most members are optimistic about the future of organising in the workplace, pessimism rises with length of service. Women are also more likely to be pessimistic than men.

On a scale of 1 to 5 (1—pessimistic; 5—very optimistic)  
How optimistic are you about the future of GMB@Work?

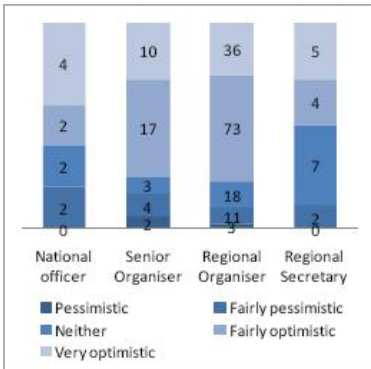


Members are more optimistic about the future of GMB@Work than they are about either the future of organising in the workplace or the future of the union movement as a whole. This reflects the overall popularity of the scheme among

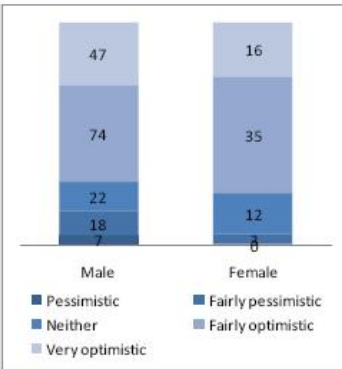
**On a scale of 1 to 5 (1—pessimistic; 5—very optimistic)  
How optimistic are you about the trade union movement?**



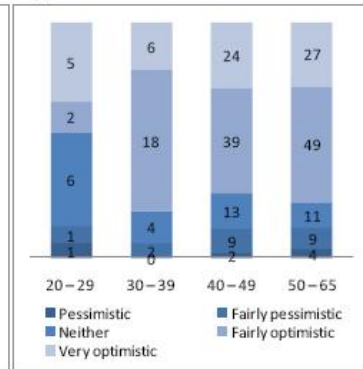
**Job title**



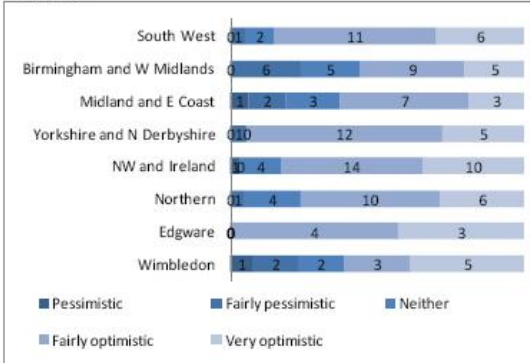
**Gender**



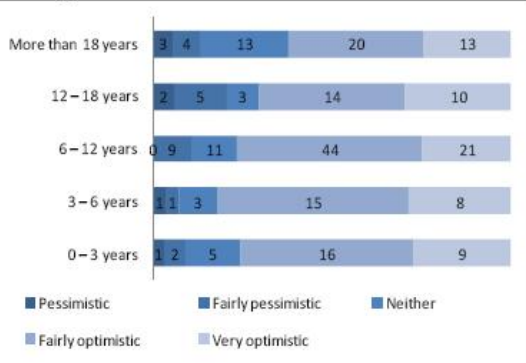
**Age**



**Office**

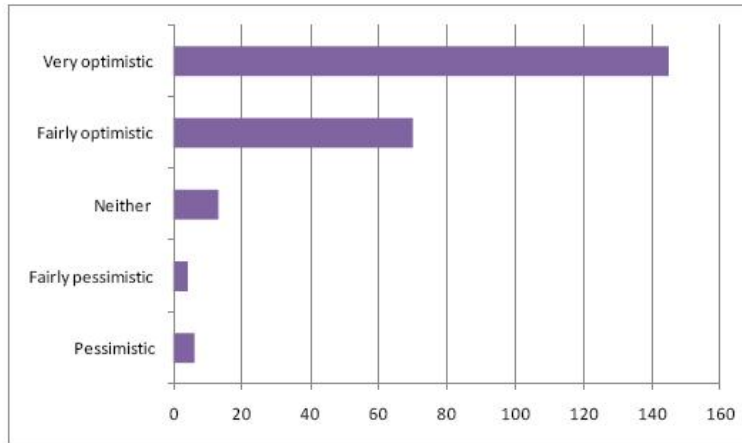


**Length of service**

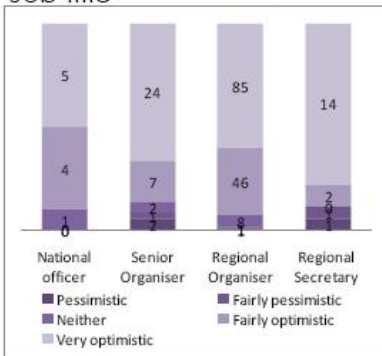


*The majority of members are optimistic about the future of the trade union movement, although—as with the future of organising—pessimism rises with length of service.*

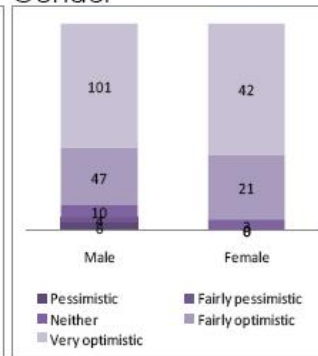
**On a scale of 1 to 5 (1—pessimistic; 5—very optimistic)  
How optimistic are you about the future of the GMB?**



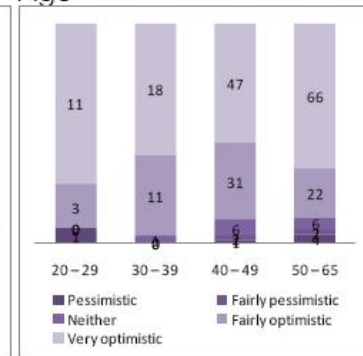
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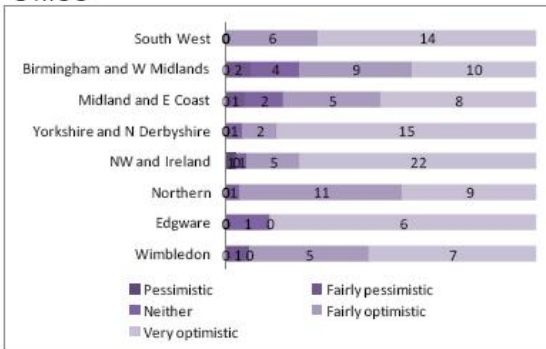
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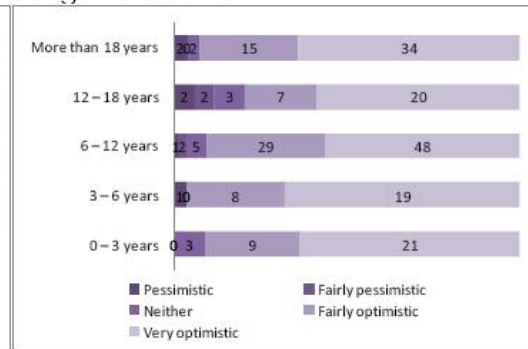
**Age**



**Office**

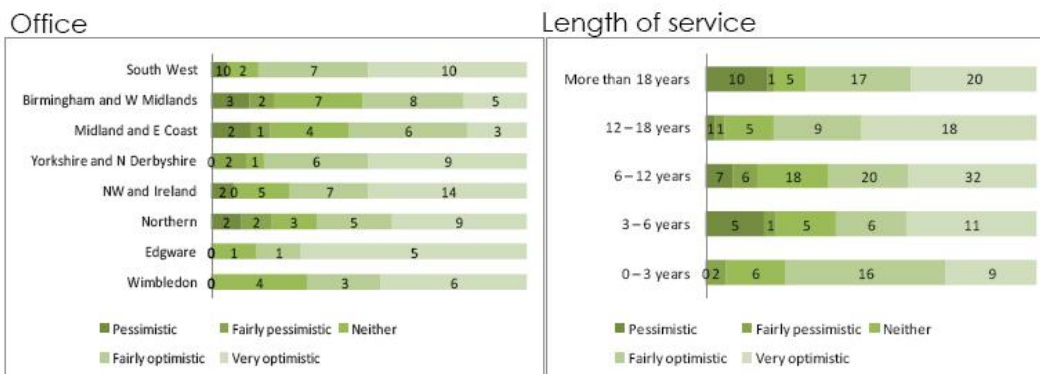
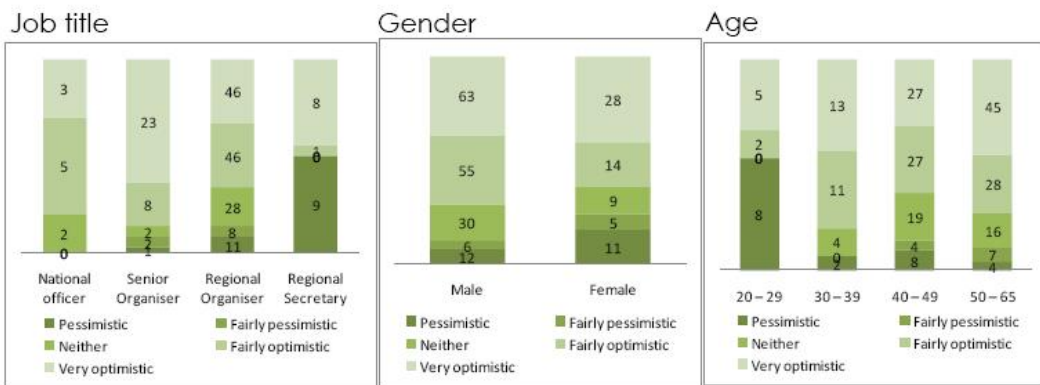
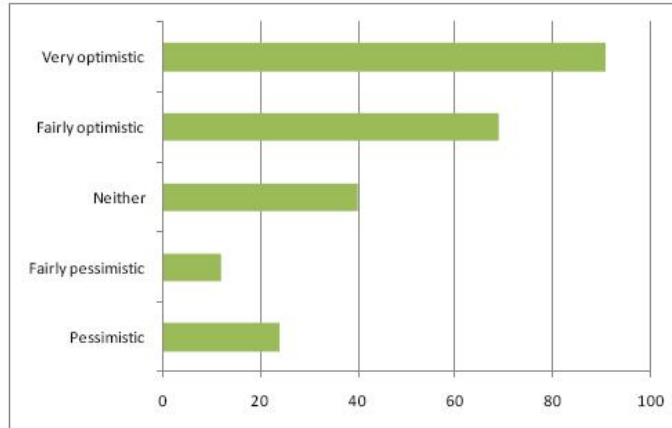


**Length of service**



*Optimism about the future of the GMB as a whole is high, with over 60 per cent 'very optimistic' and only four per cent 'pessimistic' or 'fairly pessimistic'. This positive view is broadly consistent across the organisation.*

**On a scale of 1 to 5 (1—pessimistic; 5—very optimistic)  
How optimistic are you about your future in the organisation?**



*A slightly smaller majority of respondents are optimistic about their own future in the organisation, although pessimism rates are still only 15 per cent. Women and younger employees are less likely to be optimistic than men and older employees.*



## Appendix Four – Training modules

Building the team  
(2-3 hrs)

Purpose	Competencies	Contents	Outcomes
<p>Organisations of the size and complexity of the GMB are reliant on interdependent teams. This module works with the teams that deliver GMB@Work to make them more aware of their importance and how to contribute to success. In the context of GMB@Work this module will establish the role of each individual team in delivering the vision. It will also establish the responsibility of individuals for the health of their team.] Having a session where a team are invited to be open provides a positive basis to move on from. It acts as a bonding process</p>	<p>The following competencies are addressed in this module</p> <ul style="list-style-type: none"> <li>• Team working</li> <li>• Self awareness</li> <li>• Effectiveness</li> <li>• Work practices</li> </ul>	<p>Team building will be a core module and we would look to cover all of these elements in some form.</p> <ul style="list-style-type: none"> <li>• Where is this team exercise <ul style="list-style-type: none"> <li>- What do we need to do more of</li> <li>- What do we need to do less of</li> <li>- What do we need to stop doing</li> </ul> </li> <li>• Life cycle of teams <ul style="list-style-type: none"> <li>- Form</li> <li>- Storm</li> <li>- Norm</li> <li>- Perform</li> </ul> </li> <li>• Belbin <ul style="list-style-type: none"> <li>- Analysis of team roles</li> </ul> </li> <li>• Team role in GMB@Work (working with regional Sect to establish pre session)</li> <li>• Effectiveness and action planning for GMB@Work</li> </ul>	<p>This module will;</p> <ol style="list-style-type: none"> <li>1. Achieve practical and open discussion about the team</li> <li>2. Provide clarity about the need for individuals to perform team roles</li> <li>3. Reaffirm GMB@Work team responsibility</li> <li>4. Action plan for effective delivery of GMB@Work</li> </ol>

Personal effectiveness  
(2 -3hrs)

Purpose	Competencies	Contents	Outcomes
<p>Individual performance can only be improved by the individual. This module will establish a number of practical techniques that will allow individuals to grip their own performance. This module will be useful in getting, willing people, who are not 'firing on all cylinders' to develop. In some cases this will have a knock on effect to people that work for them. In the context of GMB@Work this is a way of embedding the organisational vision at the individual level. Part of the job that the regional roll out is undertaking is to give ownership of GMB@Work to the organisers and officers that are delivering it.</p>	<p>Personal effectiveness will help to develop the following competencies</p> <ul style="list-style-type: none"> <li>• Workplace priorities</li> <li>• Time management</li> <li>• Delegation</li> <li>• Self awareness</li> <li>• Confidence</li> </ul>	<p>The module can be made up of some or all of these elements they can be tailored in time and detail.</p> <ul style="list-style-type: none"> <li>• Grip Leadership workshop <ul style="list-style-type: none"> <li>- self,</li> <li>- team,</li> <li>- and task workshop</li> </ul> </li> <li>• Effective delegation <ul style="list-style-type: none"> <li>- Development through delegation</li> <li>- Managing effectively</li> </ul> </li> <li>• Practical prioritisation and time management</li> <li>• GMB@Work through you workshop - the role of the individual in achieving the vision of the organisation</li> </ul>	<p>The session will</p> <ol style="list-style-type: none"> <li>1. Locate GMB@Work with the individual</li> <li>2. Introduce techniques on self awareness and self control</li> <li>3. Address leadership skills</li> <li>4. Assist with delegation skills</li> <li>5. Improve personal effectiveness</li> </ol>

Managing change  
(1 – 2 hrs)

Purpose	Competencies	Content	Outcomes
<p>Change at any level , organisational, personnel or individual level needs is difficult. Managing change entails thoughtful planning and sensitive implementation, and above all, consultation with, and involvement of, the people affected by the changes. In an organisation as complex as the GMB delivering change can be a long process. This module rationalises the change process for participants and allows them to work with the organisation in further change. In the context of GMB@Work many of the officers and organisers will still view GMB@Work as a relatively new change. This module places GMB@Work in that framework and binds officers into change.</p>	<p>This module will develop;</p> <ul style="list-style-type: none"> <li>• Organisational commitment</li> <li>• Understanding of Strategic context</li> <li>• Personal effectiveness</li> <li>• Advocacy</li> </ul>	<p>The module will consist of the following elements.</p> <ul style="list-style-type: none"> <li>• GMB@Work and the Eight stages of managing change <ul style="list-style-type: none"> <li>- Stage seven don't let up</li> <li>- Stage eight making change stick</li> </ul> </li> <li>• Personal role in day to day delivery of managing change <ul style="list-style-type: none"> <li>- Interpret</li> <li>- Enable</li> <li>- Facilitate</li> </ul> </li> <li>• How to involve people in change <ul style="list-style-type: none"> <li>- Engage</li> <li>- Consult</li> <li>- Inform</li> </ul> </li> <li>• Freeze, unfreeze and refreeze. Managing change techniques</li> </ul>	<p>This session will</p> <ol style="list-style-type: none"> <li>1. Provide a strategic context for GMB@Work</li> <li>2. Give responsibility for delivering change to individuals</li> <li>3. Put people at the centre of change process</li> <li>4. Explain managing change techniques</li> </ol>

Managing performance and underperformance  
(1 – 2 hrs)

Purpose	Competencies	Content	Outcomes
<p>Managing performance, particularly underperformance is potentially the most difficult task that a manager has to undertake. This module will set out a route map to addressing underperformance and will leave participants with the practical skills to address underperformance. Performance is understood in terms of GMB@Work as well as core performance indicators such as attendance/sickness etc. This module will give a number of methods of dealing with underperformance but implicit is the link to disciplinary procedures if progress cannot be achieved.</p>	<p>This session will develop;</p> <ul style="list-style-type: none"> <li>• Personal confidence</li> <li>• Effectiveness</li> <li>• People management skills</li> <li>• Communication</li> <li>• Performance measurement</li> </ul>	<p>The following elements will make up this module</p> <ul style="list-style-type: none"> <li>• Getting to the root of the problem <ul style="list-style-type: none"> <li>- Defining what underperformance is</li> <li>- Techniques to establish acknowledgment</li> </ul> </li> <li>• Dealing with the problem <ul style="list-style-type: none"> <li>- Developing support plans</li> <li>- Reviewing progress</li> <li>- Using coaching and counselling techniques</li> <li>- Building personal confidence</li> </ul> </li> <li>• Using disciplinary procedures <ul style="list-style-type: none"> <li>- When it is appropriate</li> <li>- Conducting an investigation</li> <li>- Ensuring correct steps are taken</li> </ul> </li> </ul>	<p>This module will;</p> <ol style="list-style-type: none"> <li>1. Explain processes in performance management</li> <li>2. Give techniques to address poor performance</li> <li>3. Build personal confidence</li> <li>4. Place poor performance in the context of GMB@Work</li> </ol>

Effective personal communications  
(2-3hrs)

Purpose	Competencies	Content	Outcomes
<p>Successful leadership often comes down to the way that we communicate with people. Communication must be accepted emotionally before it will be accepted cognitively – ‘gut reaction’ is the gate-keeper. Opinions and feelings are changed through <b>congruent</b> communication – that is communication that agrees with a person’s emotional reality. This module will introduce the concept of Emotional intelligence and how it can be applied to leadership situations. It is very useful in delivering messages and producing buy in. The module will be placed in the context of advocating for GMB@Work</p>	<p>This module will develop;</p> <ul style="list-style-type: none"> <li>• Advocacy skills</li> <li>• Communication skills</li> <li>• Leadership skills</li> <li>• Emotional intelligence</li> <li>• Self awareness</li> </ul>	<p>The module will consist of the following elements;</p> <ul style="list-style-type: none"> <li>• Self awareness and being emotionally aware</li> <li>• Congruent and non congruent communications</li> <li>• Emotion and facts <ul style="list-style-type: none"> <li>- Barriers</li> </ul> </li> <li>• Techniques <ul style="list-style-type: none"> <li>- Active listening</li> <li>- Maintaining state</li> <li>- Clarifying distortions in communications</li> <li>- Delivering unpopular news</li> </ul> </li> <li>• Using EI every day and advocating for GMB@Work</li> </ul>	<p>The module will;</p> <ol style="list-style-type: none"> <li>1. Provide introduction to EI</li> <li>2. Build self awareness</li> <li>3. Improve confidence</li> <li>4. EI technique toolkit</li> <li>5. Advocacy skills for GMB@Work</li> </ol>

Dealing with the media (3 hours)

Purpose	Competencies	Content	Outcome
<p>A simple media module may be applied to distil key messages and their successful delivery. The union will have other training in place for dealing with the media, but the purpose of this module is to use adversarial and high pressured environment of media relations to explore strategies and tactics to deliver key GMB@work messages. The skills developed will be just as useful in face to face communications as in the media. The media is fragmenting and changing rapidly. An understanding of the implications of new media is vital to trade union officers.</p>	<ul style="list-style-type: none"> <li>• The ability to understand and articulate key GMB@work messages</li> <li>• Understanding key audiences for the messages and tailoring delivery accordingly.</li> <li>• The ability to defend GMB@work under hostile questioning.</li> <li>• Clear understanding about successful media performance based on preparation and performance.</li> <li>• We will explore and explain the new media threats and opportunities (including bloggin, web, social networks etc)</li> </ul>	<p>The module would contain the following elements:</p> <ul style="list-style-type: none"> <li>• Core message of GMB@work</li> <li>• The GMB@work 'message house' approach will be used to develop the content</li> <li>• Understanding dividing lines, and the need for rapid rebuttal</li> <li>• We will make use of role play and video interaction giving instant supportive feedback to improve performance</li> </ul>	<ol style="list-style-type: none"> <li>1. Participants will be trained in techniques and tactics to deliver and defend GMB@work messages.</li> <li>2. Core theory and practice will be communicated to participants. They will be equipped with the 'message house' technique.</li> <li>3. Participants will be able to practice skills in a supportive environment.</li> <li>4. Participants will have an understanding of new media and its potential for use in delivery of GMB@work objectives.</li> </ol>

Presentation Skills  
(2 -4 hrs)

Purpose	Competencies	Content	Outcomes
<p>Presentation skills are key for the employees of any organisation. It means being able to deliver the organisation's messages in a professional manner. 80%+ of communication is non verbal and informal. The course will cover this vital aspect of presentation to improve participants' impact.</p> <p>Officers work with members on daily basis to develop their presentation and public speaking skills, they should have the confidence to be able to tutor those people they are organising in those skills.</p> <p>The organisers and officers will be the face of GMB@Work</p>	<p>This session will address the following ;</p> <ul style="list-style-type: none"> <li>• Speaking to an audience</li> <li>• Communicating difficult ideas and concepts</li> <li>• Personal confidence</li> <li>• Structuring messages</li> <li>• Being an effective advocate</li> <li>• Presenting well before you speak</li> </ul>	<p>The module would contain the following elements;</p> <ul style="list-style-type: none"> <li>• What is your style of presentation/public speaking (discussion)</li> <li>• Key steps in presentations/public speaking</li> <li>• Toolkit</li> <li>• Practical GMB@Work presentation/public speaking workshop – Scenario to be developed</li> </ul>	<p>This module will develop;</p> <ol style="list-style-type: none"> <li>1. Knowledge of basic good practice in public speaking and making presentations</li> <li>2. Toolkit and reference material applicable to every day trade union situations</li> <li>3. Practical example of delivering a presentation on GMB@Work</li> <li>4. Knowledge of non verbal communication (body language etc)</li> <li>5. Embeds the knowledge on GMB@Work</li> </ol>





## Appendix Five – List of priorities identified

Theme	Typical statements
Communication	<p><b>Start doing</b> ‘Improving communication’</p> <p><b>More of</b> ‘effective communication’ ‘Internal communications’ ‘Better communication’ ‘Communication’ ‘Effective communication’</p>
Consistency	<p><b>Start doing</b> ‘SO’s managing consistently across Union’ ‘Apply consistency to workplace consolidation targets’</p> <p><b>More of</b> ‘Benchmarking and sharing best practice’ ‘Consistency in best practice’ ‘Sharing of best practice’</p> <p><b>Less of</b> ‘Inconsistency’</p> <p><b>Stop doing</b> ‘Regional Variation’ ‘Inconsistency of approach between regions’ ‘Keeping success a secret’ ‘Being an ad hoc organisation’</p>
Officer training - Consistency	<p><b>Start doing</b> ‘Standard officer training package’</p> <p><b>More of</b> ‘Structured training/education for officers’ ‘Relevant training’ ‘Induction for officers’</p>
Staff inclusion	<p><b>Start doing</b> ‘Include staff in our core values’ ‘Train staff in purpose of the Union’ ‘Train staff in GMB@Work’ ‘Better staff training’</p> <p><b>More of</b> ‘Involvement and engagement of staff’ ‘Staff consultation’ ‘Educate whole structure about GMB@Work’ ‘Staff development’</p> <p><b>Stop doing</b> ‘Excluding workforce (staff) from GMB@Work’</p>
Branch role and function	<p><b>Start doing</b> ‘Making branches properly accountable’ ‘Encourage steward to use the GMB training that they receive’ ‘Functioning branches via effective training’ ‘Making branches properly accountable’ ‘Calling branch secretary meetings’</p>

Theme	Typical statements
	<p>‘Regional council members participating’</p> <p><b>More of</b></p> <p>‘Lay reps delivering GMB@Work training’</p> <p>‘Encourage reps to be more active’</p> <p>‘Work place training’</p> <p>‘Activist meetings’</p> <p>‘More branch secretary involvement’</p> <p>‘Refresher courses for shop stewards’</p> <p>‘Branch visits’</p> <p><b>Less of</b></p> <p>‘Dead inactive branches’</p> <p>‘Lay structure (value for money?)’</p> <p>‘Reps in name only’</p> <p>‘Lay members role’</p> <p><b>Stop doing</b></p> <p>‘stewards and branch secretaries job’</p> <p>‘Organisers being shop stewards’</p>
Improved management function	<p><b>Start doing</b></p> <p>‘Personal development meetings’</p> <p>‘Give praise reward and recognition’</p> <p>‘Aims and objectives process’</p> <p>‘Continue to evolve GMB@Work internally and externally’</p> <p>‘Listening’</p> <p>‘Review job descriptions’</p> <p><b>More of</b></p> <p>‘Support/Autonomy down the chain’</p> <p>‘Officer support/resources’</p> <p>‘Planning and organising’</p> <p>‘Authority to make key decisions’</p> <p><b>Stop doing</b></p> <p>‘work willing horses to death’</p> <p>‘Wasting resource’</p> <p>‘Firefighting’</p>
Cultural	<p><b>Start doing</b></p> <p>‘Pride in who we are and what we do’</p> <p>‘Believing in ourselves’</p> <p>‘breakdown silos’</p> <p>‘being constructive’</p> <p><b>More of</b></p> <p>‘Practice what we preach’</p> <p>‘Appropriate people for appropriate jobs’</p> <p><b>Less of</b></p> <p>‘Bureaucracy’</p> <p>‘Them and us attitude to management’</p> <p>‘Autocracy’</p> <p>‘Reinventing the wheel’</p> <p>‘Reactivity’</p> <p><b>Stop doing</b></p> <p>‘Blame culture’</p> <p>‘Talking about the old days’</p> <p>‘Glass ceiling’</p>

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Theme	Typical statements
	'Talking about the old days' 'New gimmicks' 'Square pegs for round holes' 'Long hours culture'
Technical improvements and specific strategy	<b>Start doing</b> 'Intranet' 'Get more workers in parliament' 'Strategy for unspecified members' 'campaigning on core values issues' 'reclaim the Labour party' 'promote online/telephone joining' 'improve regional/national web links' <b>More of</b> 'Planning before campaigns' 'political awareness about BNP' 'migrant workers recruiting migrant workers' 'up to date IT' <b>Less of</b> 'Emails' 'Targets' 'National officers' <b>Stop doing</b> 'Sending cash statements to every branch' 'commercial mail shots' 'annual congress' 'representing non-members' 'supporting anti union mps'
Young members	<b>Start doing</b> 'Young member recruitment'

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## Appendix Six– Materials Supporting Two Hour All Staff Briefing and Writing of Action Plans

### GMB UMF 2 Regional/NAU/Head Office Staff Briefing Draft Session Plan

#### Introduction

Below is a draft session plan for the delivery of the UMF2 Staff Briefing. It is meant as a guide that may be of use. It may be the case that an existing meeting or event is being used to facilitate this session – or other activities could usefully be bolted onto it.

- 10.00am Welcome – aims and objectives  
Introduction from Regional Secretary or Officer delegated that sets out the purpose of the event. This will clearly be tailored to suit the circumstances of the particular region and set it in that context.
- 10.15am Delivery of Power point Presentation
- 10.30am Discussion  
Questions and/or comments taken from the participants.
- 10.45am Traffic Light Exercise  
This exercise was used in the Senior Organiser Training Course to good effect. It may be a useful device to engage participants (it also may be interesting to see how similar the issues the emerge are to those raised there).
- Participants should be divided into three groups and provided with flip chart paper. Each group considers one of the three questions: 1) What the Union should start doing 2) What the Union should stop doing 3) What the Union should do more or less of (that it is already doing). Each group is given 5 minutes to consider each question then asked to consider the next in turn (by swapping the flip charts). The flipcharts are then displayed and feedback taken.
- 11.00am Report Back
- 11.15am Regional priorities – action planning  
Participants can be asked for their views as to the priorities that they consider the region needs to make in light of the previous presentation and exercise. The priorities pro-forma could be used as a basis for this. Area of priority/Team Action/resources needed/Person/s responsible/Measures/Timeline. It is unlikely that this task will be completed in the time available (and Regional Secretaries will need to have sign off anyway), but beginning the process might make participants feel included.
- 11.45am Conclusions and Summing up
- 12.00pm Close

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## UMF 2 Developing Our Management Structures

### Summary of main issues raised in regional roll out phase

Below is a summary of the issues raised in the regional roll out. Regional Secretaries may wish to consider these in preparation of the regional action plans previously circulated (more detail is included in the full Report).

Regions will clearly have their own priorities reflecting local circumstances and a range of initiatives already underway. What is set out below is designed to augment those rather than in any sense to be prescriptive. As far as possible the action plans should simply represent those key priorities that each region believes will be necessary to further developing and delivering [GMB@work](#).

#### Priorities identified by Senior Organisers

- Developing consistency in the line management role
- Developing the disciplinary procedure
- Including staff in the [GMB@work](#) process
- Involving the lay membership more in [GMB@work](#)
- Improved management training (standard package)
- Improving communication internally and externally
- Need to share best practice
- Give more reward and recognition
- Improving branches and aligning activity better with [GMB@work](#) objectives
- Support more devolved decision making
- Breaking down silos
- Having a strategy for unspecified members
- Promote and manage on-line joiners (need protocols)

## 3.GMB Team Action Plans

Team: \_\_\_\_\_ **For Developing, Implementing, and Aligning**  
**GMB@Work team plans** Team Members: \_\_\_\_\_ Date: \_\_\_\_\_

**Corporate strategy and development**  
**GMB@Work targets → Developing line management function→ Developing clear team protocols → Agreeing lines of responsibility and authority→ Implementing Policy→ Evaluating Policy implementation**

**Describe Team Goal(s):**

\_\_\_\_\_

\_\_\_\_\_

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline

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#### 4. GMB Team Action Plans: Evaluation

(Six/Twelve month evaluation)

Team

Team members

Date

Action step	Performance against measure	Follow up action

Staff Briefing UMF2

Date:

Venue:  
Duration of event:

**Attendees**

Name	Job title	Signature



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## ***CENTRAL TEAM ACTION PLAN***

### **(1) Introduction**

The central team of the Yorkshire & North Derbyshire region comprises of all those Officers and staff employed within the GMB regional office in Wakefield, the York office and the Leeds City Council office.

The team comprises of Organisers with industrial responsibilities, Organisers who operate within the Regional Organising Team on recruitment and organisation and support staff deployed to provide administration and secretarial support as well as providing specialist advice and guidance to members and representatives in areas such as Education, Legal, Health and Safety and Finance.

### **(2) Regional Plan**

Central team members have signed up to and are committed to the regional objectives of development of the Yorkshire & North Derbyshire region into a fully evolved organising union, through the full application of GMB@Work. All Officers and staff have received training and support on the GMB@Work strategy and all Officers have received co-tutor training to enable them to train activists on the GMB@Work strategy. The central team is committed to the regional objectives of:

- Increasing regional membership to 60,000 members by December 2010
- Achieving the regional monthly rolling recruitment average of 766 members recruited per month
- Ensuring the recruitment and development through training of new workplace organisers committed to GMB@Work
- Securing the commitment of existing GMB workplace organisers to GMB@Work through encouragement and training

### **(3) Central Team Targets**

The central team Officers are committed to achieving an area team monthly target of 235 new members each month and/or 295 new members per month when there is a joint recruitment week in that month. The Regional Organising Team is committed to achieving a monthly recruitment average of 200 per month.

Each department i.e. Finance, Education, Legal, Health and Safety, Secretarial, Postroom/communications has committed to assisting the regional plan by supporting the transfer of resources as far as possible towards frontline organising and recruitment.

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Each department will measure its own contribution to the regional plan in part by the support it provides to frontline representatives in their efforts to build GMB membership in workplaces across the region.

- **Finance Department**  
Through their support for branch officers and representatives in the smooth running of local branches
- **Education Department/CTL Project**  
Through the training and development of new and existing representatives and through the use of training opportunities as a means of encouraging non-union members to join the GMB
- **Legal Department**  
Through the provision of frontline legal advice and support in order to assist workplace representatives and members build union organisation around employment/work related legal issues
- **Health & Safety Department**  
By providing safety representatives and workplace representatives with advice, guidance and support in relation to health, safety and welfare issues in the workplace so that these issues can be used as campaigning issues and therefore organising issues
- **Secretarial/Administration and Support**  
By re-directing individual members towards local representation, by assisting local representatives with their campaigning and communication initiatives, for example, the design and supply of newsletters. By assisting, as individuals, in recruitment and organising initiatives and in the planning of such initiatives, for example, by making the appointments in workplaces during team recruitment weeks

(6) **GMB@Work Targets**

The central team Organisers and Regional Organising Team Officers will target the following areas in line with the national and regional organising team's target employers:

- School Support Staff
- Southern Cross
- Asda Stores and Distribution
- Private Hire Drivers
- Local Government and Health Service Staff
- Consolidation of part unionised workplaces
- Greenfield and non-unionised companies

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## (6) Measuring Outcomes

The following arrangements will be put in place in order to ensure the monitoring and accountability of our efforts in relation to the GMB@Work strategy:

- Monthly organising reviews with the Senior Organiser
- Organising reviews to include workplace audits designed to measure membership development, workplace mapping and new activists appointed
- A review of each branch within the central team area to measure branch viability and activity
- Quarterly recruitment weeks
- Recruitment and development of new activists through Initial Support Training

In addition, the following team arrangements will be in place to ensure the involvement of all staff in the GMB@Work strategy:

- Annual training and development review and one to ones
- Quarterly team meetings
- Staff development and training
- The development and adherence to best practice protocols
- The sharing and discussion of team and regional performance indicators such as membership recruitment statistics and training outcomes

## (6) Senior Organiser Objectives

- To support, encourage and direct team members in the pursuit of GMB@Work within the region
- To assist team members set goals, targets and to achieve those goals and targets
- To monitor and evaluate area team performance and to share these with the team
- To provide support, encouragement and direction through the system of one to one sessions and team meetings process
- To participate in bi-monthly Senior Organiser meetings to review progress and report into bi-monthly regional management team meetings.

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## WESTERN TEAM ACTION PLAN

### Preamble

Western Team is part of the regional team of the Yorkshire & North Derbyshire region of the GMB Union.

Specific regional targets have been agreed.

- To increase membership to 60,000 by December 2010.
- Regional monthly targets of 766 members recruited.
- 235 per area team per month recruited.
- 295 per area team per month where there is a specific recruitment week with regional organising team involvement (ROT). And conversion to learning involvement (CL)

The Western Team have agreed specific target areas in line with regional and national organising team targets (NOT).

These include :-

- Schools and teaching assistants.
- Southern Cross Healthcare.
- Security and airports.
- Sports section professional rugby league players.
- Local Government and Health Services.
- Greenfield and non unionised companies.
- Consolidation of unionised or any well organised workplaces.

### GMB @ Work

The Western Team have all been specifically trained and understand the principals of GMB @ Work and have agreed enthusiastically to devote their time to its achieving aims and goals.

### Measuring Outcomes

The Western Team members have agreed as part of their accountability to the principals of GMB@ Work to the following:-

- Monthly one to one meetings with the Senior Organiser (appraisal).
- One to ones will involve Audit Forms with reference to workplace monitoring and mapping.
- Branch Audits of the viability of Branches.
- Quarterly team meetings.
- Systematic workplace visits.
- Recruitment and Initial Support Training of lay officials.
- New companies in unorganised workplaces.
- Each organiser will be given up to date lists of members on their worksheets. Loss or increase in membership will be monitored and assessed.
- New targets and goals will be set with organisers periodically.
- Previous goals and targets will be given consideration with the outcomes analysed and recorded in their organising book.
- Duties will be rotated with agreement if it is deemed necessary to give individuals new opportunities

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6. **Realistic Timescales**

All measured outcomes will be monitored over the monthly period with other (ROT and NOT) targets. Particular companies in specific areas will be adjusted with guidance from the region especially ROT and NOT targets where strategies are developed outside the Western Team.

7. **Timescales**

Timescales for all companies will be set by the Senior Organiser in conjunction with the Regional Management Team (RMT), ROT and NOT.

8. **The Western Team Organisers Strategic Objectives**

The Western Team organisers are:

Doug Cooper  
Gary Baker  
Steve Morris  
Tristan Chard

Doug Coopers target areas are Security and Kirklees Local Authority.

Gary Bakers target areas are Health Service, Calderdale Council, Manufacturing and Gas.

Steve Morris's target areas are Bradford MDC, Manufacturing and Electrical Generation and Distribution.

Tristan Chards target areas are to develop as a new Organiser and will develop in DHL, Airports, Yorkshire Water and other service and manufacturing workplaces.

All organisers are committed to work closely with support staff and adhere to the regions best practice protocols

All in accordance with the SMART objectives set in the Team Plan and GMB @ Work.

9. **Senior Organiser Objectives**

- To develop team strategy.
- Monitor and evaluate area team.
- To set goals and targets.
- To monitor and assist (where necessary) the welfare of the team through one to one monitoring and referral to Occupational Health where necessary.
- Participate in bi-monthly Senior Organiser (SO) meetings to review the above and feed into RMT meetings

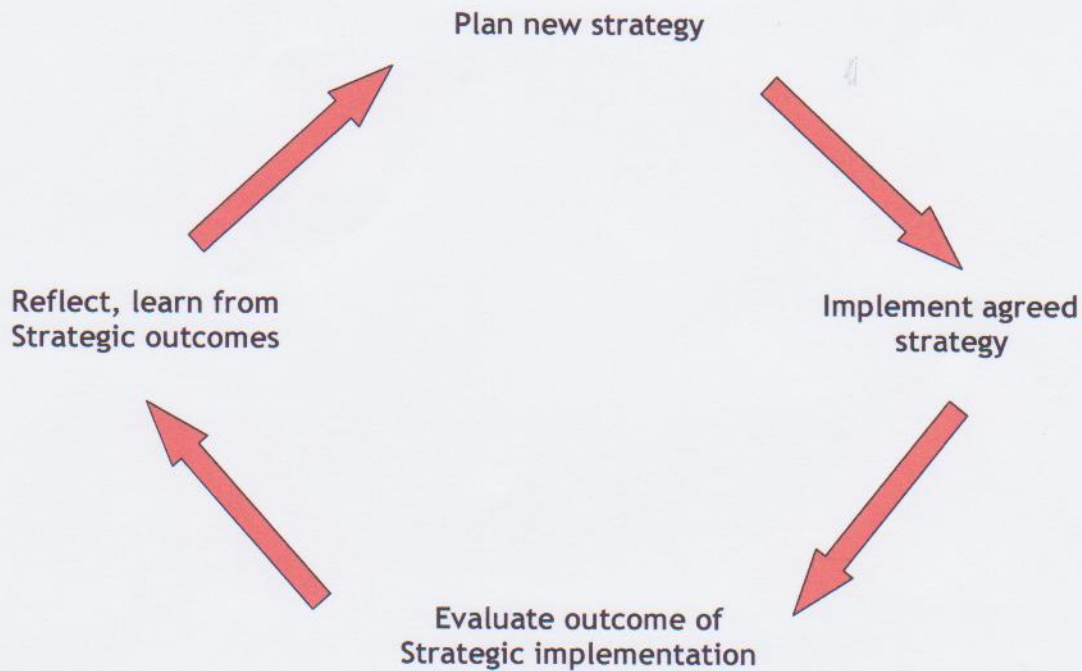
10. **Evaluation Strategy**

The success of the Union, Region and individual teams depend upon the following:-

- The implementation of GMB @ Work.
- The implementation of NOT targets.
- The implementation of ROT targets.
- Strategic decisions of the SMT.
- Strategic decisions of the RMT.

- The monitoring and evaluation of all strategies.
- The training and development of Senior Managers.
- The training and development of Organisers.
- The training and development of all Staff.
- The training and development of Lay Officials.
- Communication, open and transparent both vertically and horizontally throughout the Union.
- Double Loop Learning Strategy (learning from your learning).

### THE STRATEGIC CYCLE



Steve Jennings  
Senior Organiser/Political Officer MCIPD



## SOUTHERN AREA TEAM ACTION PLAN

### 1. Preamble

- a) The Southern area team is part of the regional team of the Yorkshire & North Derbyshire region of the GMB Union.
- b) Specific regional targets have been previously agreed:
  - ❖ To increase membership to 60000 by December 2010
  - ❖ Regional monthly targets of 766 new members by
  - ❖ Recruiting 235 per area team per month and
  - ❖ 295 per area team per month where there is a specific recruitment week with Regional Organising Team/Conversion to Learning Team involvement
- c) The Southern team have agreed specific target areas in line with regional and national organising team targets which include:
  - ❖ Schools based staff (by local authority area on a rotational basis)
  - ❖ Southern Cross Healthcare
  - ❖ Security and airports
  - ❖ Sports section professional rugby league players
  - ❖ Local Government and Health Services
  - ❖ Greenfield and non unionised companies
  - ❖ Consolidation of unionised or any well organised workplaces

### 2. GMB@Work

The whole team has been specifically trained and understand the principles of GMB@Work and have agreed enthusiastically to specifically target their time to achieving its aims and goals.

### 3. Measuring Outcomes

Team members have agreed as part of their accountability to the principles of GMB@Work to the following:

- ❖ Monthly organising review meetings with the senior organiser for officers
- ❖ MORs will involve the completion of workplace audit forms with reference to workplace monitoring and mapping
- ❖ Quarterly team meetings
- ❖ Work with and promote partners such as Thompsons, LV= etc
- ❖ Branch audits of performance and viability of Branches
- ❖ Systematic workplace visits
- ❖ Recruitment and Initial Support Training of lay officials

- 
- ❖ New companies in unorganised workplaces
  - ❖ Each organiser will be given up to date lists of members on their worksheets so that loss or increase in membership can be monitored and assessed
  - ❖ New targets and goals will be set with organisers periodically
  - ❖ Previous goals and targets will be given consideration with the outcomes analysed and recorded

### Realistic Timescales

All measured outcomes will be monitored over the monthly period with other (ROT and NOT) targets. Particular companies in specific areas will be adjusted with guidance from the region especially ROT and NOT targets where strategies are developed outside the team area.

### Timescales

Timescales for all companies will be set by the Senior Organiser in conjunction with the Regional Management Team (RMT), ROT and NOT.

### Organisers' Strategic Objectives

The team organisers, secretaries and objectives are:

Peter Davies: Sheffield City Council including schools and outsourced contractors together with third sector employers. Supported by Lita Southam with assistance from Robert Carlson.

Trevor Finch: Chesterfield, North Derbyshire, North Nottinghamshire and parts of south Sheffield. Supported by Claire Bednall with assistance from Sheffield secretarial team.

Sue Hill: Rotherham MBC and associated contractors, Southern Cross, Sheffcare and Sheffield Hallam University. Supported by Rachel Harrison with assistance from Robert Carlson.

Bob McNeill: Doncaster MBC and associated contractors together with wider Doncaster area plus NAECI and TICA membership. Supported by Karen Warsop with assistance from Robert Carlson.

Paul Wade: Barnsley MBC and associated contractors together with wider Barnsley area. Supported by Rachel Harrison with assistance from Robert Carlson.

All work to increase membership, improve workplace/branch organisation and service membership in accordance with the SMART objectives set in the team plan and GMB@Work.

### Senior Organiser Objectives

- ❖ To develop team strategy
- ❖ Monitor and evaluate area team
- ❖ To set goals and targets

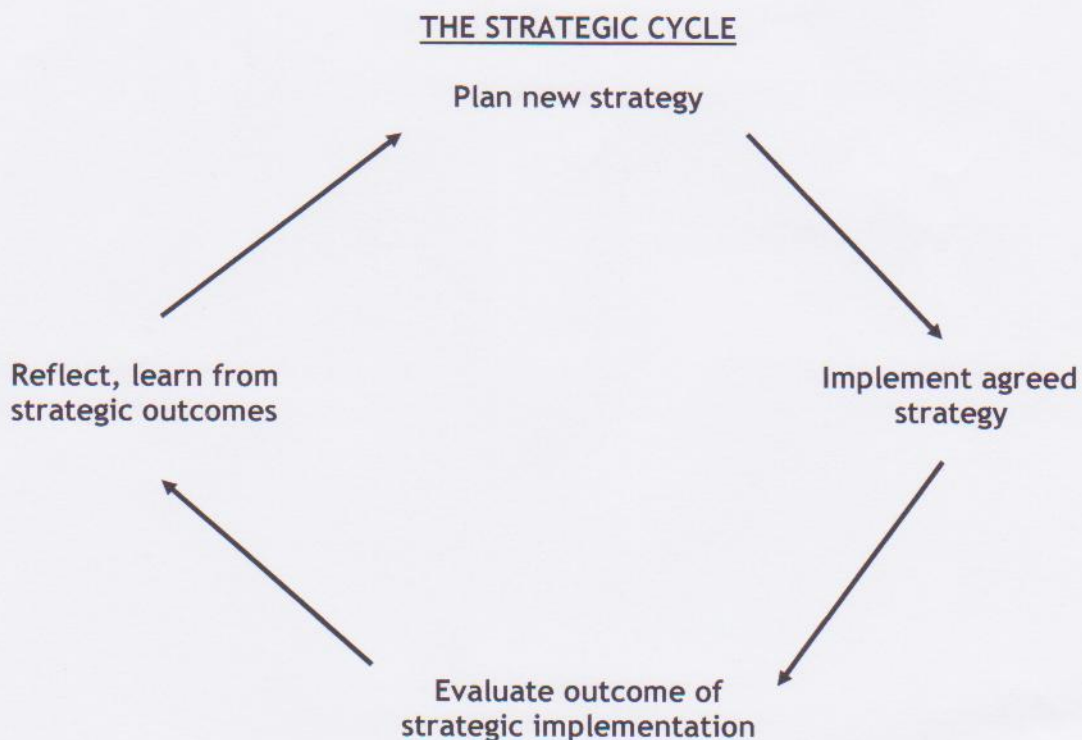


- ❖ To monitor and assist (where necessary) the health, safety and wellbeing of the team through one to one monitoring and referral to occupational health where necessary
- ❖ Participate in bi-monthly SO meetings to review the above and feed into
- ❖ Bi-monthly Regional Management Team meetings

## 8. Implementation and Evaluation Strategy

The success of the Union, Region and individual teams depend upon the following:

- ❖ The implementation of GMB@Work
- ❖ The implementation of NOT targets
- ❖ The implementation of ROT targets
- ❖ Strategic decisions of the SMT
- ❖ Strategic decisions of the RMT
- ❖ The monitoring and evaluation of all strategies
- ❖ The training and development of senior managers
- ❖ The training and development of organisers
- ❖ The training and development of all staff
- ❖ The training and development of lay officials
- ❖ Communication, open and transparent both vertically and horizontally throughout the Union
- ❖ Double Loop Learning Strategy (learning from your learning)





## GMB NATIONAL ADMINISTRATION UNIT

The National Administration Unit team's action plan for the next twelve months builds on the Unit's role in providing the support services to National and Regions that assist them in delivering their strategic GMB@Work targets. We will:

1. Deliver the highest quality support services by continually reviewing and developing our systems and processes.
2. Provide monthly consolidated financial accounts and regular reports to the CEC and SMT to assist in monitoring Income and Expenditure performance against budgetary targets.
3. Provide accurate membership statistical reports that will enable the CEC and SMT to monitor performance against targets and to redirect resources as necessary.
4. Ensure the financial resources are available by reviewing and improving our credit control function to maximise our cash flow position.

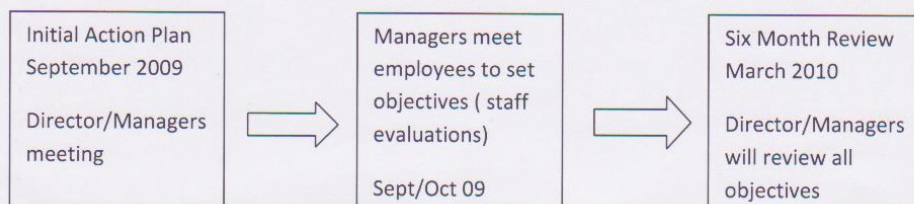
To achieve in these areas, the management team will actively manage staff to perform to a high level. The team have participated in introductory management training as part of the UMF project; the objective is to build on that training to improve our line management function. This will include;

1. Making all employees at the National Administration Unit aware of the GMB@Work philosophy
2. Setting targets and goals for each employee that reflect GMB@Work strategy
3. Encouraging teams to take ownership of their workload
4. Creating awareness in teams through regular team/department meetings with feedback on activities and performance
5. Motivating team and actively rewarding and publicising success
6. Providing feedback for all employees through team/department meetings and on a one to one basis at staff evaluations

These targets will build on the leadership skills of our management team members and will strengthen the buy in from employees.

### Evaluation and Timescales

- Director and managers will monitor GMB@Work targets and regularly review reporting systems
- Managers will review targets for each employee at regular intervals
- Reports will be produced and reviewed at team/department meetings
- Monitoring of team motivation activities and success publicity
- Review objectives and performance at staff evaluations (one to ones)





## GMB Team Action Plans

### For Developing, Implementing, and Aligning GMB@Work team plans

Team: National Administration Unit Team Members: Alex McMillan; Karen Smith; Graham Dow; Bob Robinson Date: 31<sup>st</sup> August 2009

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Meet with staff to discuss performance, set objectives that relate to GMB@Work strategy	Complete evaluation process	Existing resources.	Director, Managers & Team Leaders	Process completed Training plan established Outcomes reviewed	September 2009 October 2009 March 2010
Provide the highest quality systems and support services	Review and modernisation of the Branch Accounting System	Existing resources	Graham Dow and NAU Finance Team	Agree new layout of Branch Financial Report SMT to Approve Issue to Branches	September 2009 November 2009 January 2010
Provide consolidated financial reports to CEC & SMT to monitor Income and Expenditure against Budgetary Targets	Installation of Sunsystems 5 and Vision executive reporting suite	Resources already committed / Finance Staff time and commitment.	Graham Dow/Alison Turtle	Successful migration of accounting data Production of consolidated reports from Sunsystems 5	September 2009 September 2009



Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Prepare and present CEC and SMT with financial performance targets/budgets for 2010	Liaise with National Office and GMB Regions to co-ordinate budget process	Existing National and Regional finance departments	Graham Dow/ RFOs	Balanced budget for 2010 presented to and approved by CEC	December 2009
Review and improve our credit control function to maximise our cash flow position.	Introduce improved reporting systems to identify and target overdue employers .	Existing resources	Credit Controller	Improvement in cash flow and fewer employers appearing on overdue debtors report.	December 2009 and ongoing
Improve the quality of membership information received from employers.	Identify & communicate with employers where improvement required.	Existing resources	Team Leaders / Team members	More accurate membership database and improved statistical reports.	Continuous
Efficient utilisation of personnel resources.	Reorganise Membership department.	Existing resources	Director NAU / Membership Manager	Ability to achieve performance targets and meet agreed timescales. Better working relationships.	December 2009



Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Review current working practices to develop best working practices.	Teams to identify and agree best working practices and develop procedures manual.	Existing resources	Membership Manager/ Team Leaders/ Team members	Implementation and adherence of best working practices. Introduction of procedures manual.	February 2010
Support and maintenance of GMB computer systems and communications network.	Review and develop systems to ensure high quality systems and support services.	Existing Resources	Bob Robinson / IT Department	Measure and reporting of systems and network downtime.	Continuous.
Review hardware and software for GMB e-mail and file sharing systems.	Formulation of a needs analysis and proposal for mail and file sharing servers.	Existing Resources / Hardware Software suppliers.	Bob Robinson / IT Department	Production of needs analysis with options, recommendations and costings for consideration by SMT	November 2009
Review of desktop PCs and Software.	Formulation of a report outlining the possible choices for replacement of desktop computers.	Existing Resources / Hardware Software suppliers.	Bob Robinson / IT Department	Production of needs analysis with options for replacement, recommendations and costings for consideration by SMT	November 2009



## Appendix Two

### Midland & East Coast Region - Action Plan Briefing

Midland Region's action plan for the next twelve months builds on the teams role in delivering strategic GMB@Work targets including;

1. Facilitating new recruitment projects in Wilkinson's, Local Authorities, and NHS, with ROT
2. Consolidating and growing existing branches increasing overall branch membership to 57,000
3. Targeted GMB@Work training for 22 branches
4. Reviewing, updating and re-implementing Best Practice for Staff and Officers

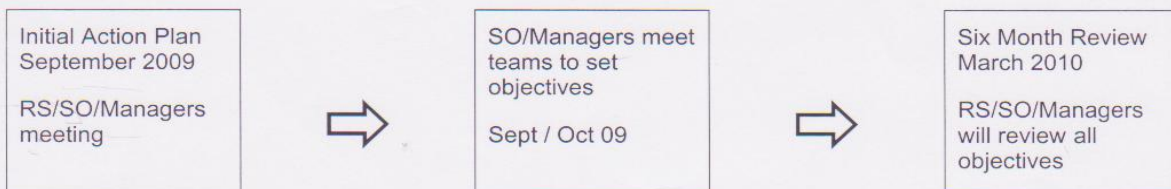
To achieve in these areas the team will need to actively manage officers and staff to perform to a high level. Team members have taken part in introductory management training for the UMF project the objective for the team is to build on that training to improve our line management function. This will include;

1. Setting targets and goals that reflect GMB@Work for each employee
2. Encouraging ownership of workload by Teams and Organisers
3. Creating awareness in teams through half day team sessions with feedback
4. Motivating team and actively rewarding/publicising success
5. Providing feedback loops for all employees (one to ones)
6. Consultation on Best Practice

These targets will build on the leadership skills of our team members and will strengthen the buy in from officers and employees for the targets.

#### Evaluation and Timescales

- RS and Senior Organisers will review regional GMB@Work targets
- Seniors and managers will review targets for each Team at regular intervals
- Seniors and managers will produce a strategy for encouraging ownership of GMB@Work and track progress
- Reports will be produced and reviewed on half day sessions
- Best Practice reviewed by end December 2009
- Monitoring of Team motivation activities and success publicity
- Recording one to ones



*Andy Worth*

Signed ..... (Regional Secretary)

Northern Region Team action plan for the next twelve months builds on the team's role in delivering strategic GMB@Work targets including;

1. Implementation of the Telephone Joining initiative across Region and continuing to promote joining on-line
2. Implementation of Retention project based upon tracking and contacting Leavers/Apparent Leavers; based on direct intervention through Lay representatives and Branches
3. Implementation of the 1 Day GMB@Work training for all existing GMB Lay Representatives including ULRs
4. Continued implementation of the 2 Day GMB@Work training for new GMB Lay Representatives including ULRs
5. Implementation of GMB@Work consolidation through workplace representatives, branches and teams; Workplace Mapping and Audits to be completed for all recognised workplaces with GMB density of less than 60%
6. Continuous growth in GMB Young Member membership
7. Re-launch the Northern Region Website and monitoring its progress
8. Implement Regional Paperless Office Project
9. Full Compliance with the Regional GMB@Work NOT Reporting System including electronic recording of GMB training undertaken by Lay Representatives including ULRs
10. Collective understanding amongst Administrative Staff and Officers of the GMB@Work National and Regional Strategy and Objectives
11. Continuous growth in GMB Northern Regional Membership-increased income; control of outgoings; extending regional financial reporting to all employees through area teams
12. Implementation of follow on training for GMB Lay Representatives within three months of completion of the 2 Day GMB@Work course
13. Comprehensive review of Branch structures across the Northern Region in line with GMB@Work policies
14. All Northern Region Staff to be motivated to become multi functional and to work flexibly

To achieve in these areas the team will need to actively manage officers and staff to perform to a high level. Team members have taken part in introductory management training for the UMF project the objective for the team is to build on that training to improve our line management function. This will include;

1. Setting targets and goals that reflect GMB@Work for each employee
2. Encouraging ownership of workload of teams and GMB@Work
3. Creating awareness in teams through half day team sessions with feedback
4. Motivating team and actively rewarding/publicising success
5. Providing feedback loops for all employees (one to ones)

These targets will build on the leadership skills of our team members and will strengthen the buy in from officers and employees for the targets.

#### Evaluation and Timescales

- RS and Seniors team will review regional GMB@Work targets
- Seniors and managers will review targets for each employee at regular intervals
- Seniors and managers will produce a strategy for encouraging ownership of GMB@Work and track progress
- Reports will be produced and reviewed on half day sessions
- Monitoring of team motivation activities and success publicity
- Recording one to ones
- 





### 3. Northern Region

Developing, Implementing, and Aligning GMB@Work team plans      Date:   September 2009  

Team:   Northern Region        Developing, Implementing, and Aligning GMB@Work team plans  
 Team Members: All Employees      Date:   September 2009  

#### Corporate Strategy and Development Putting Our Members First

**GMB@Work targets** → Developing line management function → Developing clear team protocols → Agreeing lines of responsibility and authority → Implementing Policy → Evaluating Policy implementation

**Describe Team Goal(s):**   Facilitating recruitment projects in National and Regional Projects; Consolidating and growing existing branches; Continuous increase in overall branch membership; Targeted GMB@Work training for branches and new reps; Increasing income, Controlling outgoings and improving regional financial reporting; Effective Workplace Organisation to be at the heart of Regional performance with Recruitment, Representation and Retention the fundamental elements; Efficient support systems to maximise income.

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Implementation of the Telephone Joining initiative across Region and continuing to promote joining on-line	All Staff to be trained on process and review after 6 months; monitoring of on-line joining to be reported	Training of all Staff to be completed	Bill Moran; Pauline Farthing	Regional Training to be undertaken at Offices	Review in March 2010

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
	through Regional GMB@Work NOT Reporting System				
Implementation of Retention project based upon tracking and contacting Leavers/Apparent Leavers; based on direct intervention through Lay representatives and Branches	All Leavers/Apparent Leavers to be contacted to see why they have left, establish issues and try to re-join them.	Retention and Recruitment Materials; Membership system to reflect why people leave; Officer, Staff and Lay Representatives' time	Officer listed on duty sheet	Letter to address provided; telephone call; personal contact, feedback to Officer and recording on Regional GMB@Work NOT Reporting System	Review March 2010
Implementation of the 1 Day GMB@Work training for all existing GMB Lay Representatives including ULRs	All Existing Representatives to be trained.	1 Day GMB@Work Course materials; Venues	Billy Coates Senior Organiser, Regional Organising Team (ROT)	All Team Senior Organisers to make Billy Coates aware of training needs; Training to be arranged.	September 2010
Continued implementation of the 2 Day GMB@Work training for new GMB Lay Representatives including ULRs	New Representatives to be given Initial Support Training (IST) by Officer; Training to be Arranged	IST materials; 2 Day GMB@Work Course materials; Venues	Billy Coates Senior Organiser, Regional Organising Team	All Team Senior Organisers to make Billy Coates aware of training needs; Training to be arranged.	September 2010

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Implementation of GMB@Work consolidation through workplace representatives, branches and teams; Workplace Mapping and Audits to be completed for all recognised workplaces with GMB density of less than 60%	Regional GMB@Work NOT Reporting System and other electronic systems to be utilised on a weekly basis; All Officers to undertake Requisite Workplace Mapping and Audits	Electronic systems; Workplace Map/Audit form; Recruitment and Retention Materials Workplace Map/Audit Form	Officer listed on duty sheet	Officer visit; Meeting with Branch/Shop Stewards; Workplace Map to be undertaken to enable robust Workplace Map and Audit to be completed by Officer and returned to Secretary for input on Regional GMB@Work NOT Reporting System. Weekly Monitoring to enable GMB@Work consolidation to be effectively implemented	Review March 2010
Continuous growth in GMB Young Member membership	Young Members' Officer to work with Regional Officers to promote our services as part of GMB@Work Consolidation Project	Targeted Retention and Recruitment Materials	Young Members' Officer with ROT support	Letter to address provided; telephone call; personal contact	Review March 2010
Re-launch the Northern Region Website and monitoring its progress	Regional Website Project Team to complete any work that is outstanding to finish the project; monitoring how the website is performing as part of GMB service delivery	Electronic data; Re-launch materials; promotion of the Website to existing and new GMB Members; time of the Regional Website Sub Group	Regional Management Information Systems Officer with the support of the Regional Website Sub Group	Final Proofing of the system to be completed; any technical issues to be resolved; Website re-launched; monitoring to be undertaken	Review October 2009

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Implement Regional Paperless Office Project	Analysis of environmental and cost implication to the Region and looking at the way in which we receive, handle, store and retrieve documents	Staff Time; Requisite Scanning and Storage Facilities; Disaster Recovery Facility	Bill Moran supported by Regional Project Team	Analysis of our working practices by scanning and storing documents electronically to reduce administration time; administration costs; speed up communication processes to individuals and teams; more effective filing and retrieving systems, standardisation of working practices.	September 2010
Full Compliance with the Regional GMB@Work NOT Reporting System including electronic recording of GMB training undertaken by Lay Representatives and ULRs	Weekly information to be input and reported to Regional SMT on a weekly basis	Paper returns where required; Electronic updating	Officer listed on duty sheet; Education Department	Officers to provide information to Secretaries so that system can be verified with the GMB Membership and MIS; Education Department to oversee training record update	Review March 2010
Collective understanding amongst Administrative Staff and Officers of the	Reviews at Team and Regional Meetings on a Weekly; Monthly;	Time; electronic and where appropriate paper information	Regional Management Team	Meetings, Training Needs and Managerial assessment to be	Review March 2010

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
GMB@Work National and Regional Strategy and Objectives	Quarterly basis			regularly reviewed to enable collective understanding to be reinforced	
Continuous growth in GMB Northern Regional Membership-increased income; control of outgoings; extending regional financial reporting to all employees through area teams	Monitoring of Regional membership on a weekly basis	Electronic systems; Postage, Telephone; Internet; Recruitment and Retention Materials	Regional Management Team	Weekly Monitoring to enable Regional Strategy and Action Plan to be implemented	January 2010 then weekly thereafter
Implementation of follow on training for GMB Lay Representatives within three months of completion of the 2 Day GMB@Work course	All Existing Representatives to be trained on a needs basis	MIS; Course materials; Venues; Tutors	Education Department	Education Department to work with Team Senior Organisers to ensure Training needs are accommodated	Review March 2010
Comprehensive review	Regional GMB@Work	Regional GMB@Work	Regional Management	GMB@Work Audit of	Review March 2010

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
of Branch structures across the Northern Region in line with GMB@Work policies	NOT Reporting System; electronic and other systems to be used as a basis of auditing the progress of Branches in meeting GMB@Work objectives	NOT Reporting System; Regional Financial Reporting Systems	Team	Branches to establish where Branches are meeting the aims and objectives of GMB@Work as per GMB Policy; any remedial action to be taken as per GMB Rulebook	with a view to completion by March 2011
All Northern Region Staff to be motivated to become multi functional and to work flexibly	To establish a baseline of the skills, abilities, training and development needs to ensure commitment to the GMB@Work culture throughout the Northern Region	Time; skills analysis; training and development opportunities made available	Bill Moran reporting to the Regional Management Team	Through Team briefings; training and continuing development; review of working practices; communication and feedback; to embed GMB@Work principles	Review March 2010

## GMB Team Action Plans

### For Developing, Implementing, and Aligning GMB@Work team plans

Team: National Office

Date: 12<sup>th</sup> September 2009

**Describe Team Goal(s): To bring about more effective communication and briefings within National Office across the sections and departments to ensure all National Office employees are aware of GMB@work and their individual role in achieving its objectives.**

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
To ensure that all National Office employees understand the GMB@work strategy.	Provide training session on GMB@work, how it has changed since its conception and the new skills training provided to workplace organisers.	Meeting facilities, equipment and catering. Release of all employees to attend briefing. Members of the NOD to carry out the training.	Martin Smith overall responsibility, assistance from members of NOD and HR department.	All National Office, officers and employees to have been trained as described.	By the end of 2009 with on-going training as part of induction process for any new starts.
To ensure that all National Office Employees are aware of current membership statistics, that they receive a briefing on the role of GMB@work in achieving these statistics and their individual roles.  To more effectively utilise the knowledge and skills of the specialist departments in National Projects and NOT strategic	Quarterly lunchtime briefing sessions to be held in National Office.  Convene interdepartmental meetings with members of specialist departments and a lead organiser from the NOD on each of the National Projects.	Meeting facilities, equipment and catering. Colleagues from the NOD and specialist departments who feel they have something of interest to contribute.  Meeting facilities, equipment and catering. Availability of relevant colleagues for meetings.	Martin Smith, Specialist Departments, HR department.  NOD lead organisers.	Attendance at briefings and volunteers to give briefings forthcoming.  Attendance of a nominated individual from each department.	Every 3 months, giving advance notice to all employees.  By end of 2009 with plans for future meetings on progress and review of current National Projects or new National Projects.

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
planning and review.					
To ensure all GMB Officers are adequately trained on pension issues and are capable of meeting the needs of GMB members and work place representatives on these issues.	National Pensions department to carryout pensions training for all GMB Officers.	Meeting facilities, equipment and catering. Availability of relevant colleagues for meetings. Time and resources of members of the pension department to carryout the training.	National Pensions department.	Attendance of all GMB officers at this training. Feedback from officers that the training has been successful.	By July 2009 with on-going training for new starts.
To ensure all new officers in the GMB are given adequate training to help them effectively integrate into the GMB.	To carry out two and half day training sessions for all officers who have commenced their role within the last 2 years.	Meeting facilities, equipment and catering. Availability of relevant colleagues for meetings. Time and resources of members of the NOD and HR department to carryout the training.	Martin Smith, Avril Chambers and members of the HR department.	Attendance of all GMB officers at this training. Feedback from officers included, their managers and Regional Secretaries.	By end of 2009 with on-going training for new starts.
Analyse current work practices and procedures within GMB National Office.	Carry out a review of all office equipment and office procedures at GMB National Office.	Time and resources and availability of colleagues to for meetings. Discussion and feedback from National Office employees.	Allan Wylie, Anna O'Donovan and HR dept.	More efficient procedures for dealing with any problems. More effective use of office equipment and IT.	Review to be completed by early 2010, with changes to be implemented by summer 2010.
To effectively manage shared data within GMB National Office, with possible adaptation for use across whole of the	To carry out an analyse of how best to share data across GMB National Office e.g. Intranet, Shared drives etc.	Time and resources and availability of colleagues to for meetings and to carry out analyse. Discussion and	Allan Wylie, IT and communications department.	Creation of a more streamlined approach to the sharing of data. Positive feedback from employees.	To be in place by summer 2010.



Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Union.		feedback from National Office employees.			

### GMB Team Action Plans

**Team: Birmingham Region For Developing, Implementing, and Aligning GMB@Work team plans**

**Date: 22<sup>nd</sup> September 2009**

**Corporate strategy and development**

**GMB@Work targets → Developing line management function → Developing clear team protocols → Agreeing lines of responsibility and authority → Implementing Policy → Evaluating Policy implementation**

**Describe Team Goal(s):** delivering strategic GMB@Work targets, including staff development and reviewing and improving where necessary lines of communication including; a complete review of the staff/officer induction programme.

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Review of induction programme	SO's to develop a revised strategic induction programme	Nothing at this stage. SO time to develop and implement	MH and PH with assistance from other area team SO's	Staff development reviews	3 months for implementation and ongoing review process
Career development for staff	Consistent one to one interviews with Line Manager	Ongoing review of training budget and opportunities	Appropriate line manager	Training needs identified and developed	Minimum 6 months
Deliver GMB@Work to staff	Design GMB@Work bespoke course for staff	Organiser Tutor	Regional Organising Team Representative	Service to the regional membership	6 months
Review of Regional	Meeting with Line	Existing Best Practice	All Line Managers	Implementation of	3 months

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Communication Strategy	Managers	document		Policies & Procedures	
Regional review of inactive Branches and Representatives	Identify inactive Branches/Reps	Through audits and Branch Development Plans	Area Teams	Increase in attendance at GMB@Work training	12 months



### 3.GMB Team Action Plans

Team: South Western For Developing, Implementing, and Aligning GMB@Work team plans Team Members:

Date: 28.9.09

Team Goal(s): To fully implement the recommendations in the updated 'A Framework For the Future of the GMB: Update 2009'

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Consolidating the improved regional situation	Producing a mapped out timeline with allocated resource and responsibility for targets. Active management of performance by seniors	Existing	Regional Secretary, Senior Organisers, Regional Organising Team, Regional Finance & Administration Officer, Human Resources Manager	Production of the timeline Establish targets Performance against targets Buy in from officers	To be produced by Dec 09 for implementation in Jan 2010
Implementing GMB@Work in all workplaces and branches	Continued roll out of the organising imperative via contact with branches. Planned schedule of engagement with officers	Existing	Senior Organisers, Regional Organisers	Targets Buy in	Reviewed April 2010

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Identifying new reps and talent	<p>Refresher meeting with officers on talent spotting.</p> <p>Implementation of database of potential reps established for whole region.</p> <p>Three stage engagement/ approach method adopted</p>	ROT and existing Officer force	Senior Organisers, Regional Organisers, Tutor Organisers,	<p>Buy in from officers</p> <p>Active and live database of potential new reps</p> <p>Number of contacts established and engaged.</p>	April 2010
Administrative targets on contacting members and following up contacts implemented	<p>Regional policy review of admin procedures on following up members contacts.</p> <p>Processes implemented to ensure pre-dated issues are not addressed with new joiners</p> <p>Leavers systematically</p>	Administrative staff	Regional Finance & Administration Officer, Human Resources Manager, Senior Secretaries	<p>Administrative targets achieved</p> <p>Members canvassed on level of service received</p> <p>Number of leavers contacted</p>	April 2010



Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
	contacted				
Training delivered to targeted workplace reps	Training reviewed in line with national best practice and five key principles  Retraining of reps to be encouraged	Existing	Senior Organisers, Tutor Organisers for GMB@WORK, Other training using TUC Tutors		April 2010
Staff and officers regular meeting to discuss performance and set objectives that related to GMB@Work	Evaluation process	Existing resources	Regional Secretary, Senior Organisers, Regional Finance & Administration Officer, Human Resources Manager	Process completed  Training plan established  Outcomes reviews	April 2010

### 3.GMB Team Action Plans

Team: Scotland For Developing, Implementing, and Aligning GMB@Work team plans Team

Members: \_\_\_\_\_ Date: 19<sup>th</sup> September 2009

**Corporate strategy and development**

GMB@Work targets → Developing line management function → Developing clear team protocols → Agreeing lines of responsibility and authority → Implementing Policy → Evaluating Policy implementation

Describe Team Goal(s): \_\_\_\_\_

- Alignment of Team Goals with delivering Gmb@Work as the strategic objective across the Region \_\_\_\_\_

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
Building on Regional Progress GMB@Work	Closer working relations Senior Organisers Organising Teams	Existing	Regional Secretary Senior Organisers Organising Team Leader Regional Organisers	Performance Against Targets Buy in	Implementation October 2009 -
Implementations in full GMB@Work within Regional Office and Sub Office	Improved communications between Departmental Heads – Breakdown of functional silos and achieve cross functional working	Existing	Senior Organisers Heads of Department Team Leader	Cross functional team meetings. Improved integrated processes	Implemented Review April 2010
Embedding GMB@Work in all Workplaces and Branches	Rollout of Training New Reps Increased Contact Organisers and Workplaces Build Branch	Additional Training Train the Trainers Organising Team	Education Department Organising Team	New Reps Trained Workplace Contacts	Ongoing Review April 2010

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
	Relationships Training IST GMB@Work				
Developing Management Structures & Devolved Decision Making	More Responsibility Accountability Making Decisions	Existing	Regional Secretary Senior Organisers Team Leader Department Heads	360° Feedback Process	Ongoing 6 monthly review
Inclusion of Regional Office Staff and Sub Office Staff in GMB@Work	Improved Communications between and across departments Breakdown silos Cross functional flexibility	Existing	Regional Secretary Head of Finance Office Supervisor	Reduce stress Reduced Complaints Inclusive approach Integrated Processes	January 2010 - 2011
Identify and assess Talent pool within new and existing reps	Develop Data Base 3 Sections Liaison Senior Organisers, Organising Team and Regional Organisers Education Officer	Existing	Senior Organisers/Organising Team Education Officer	Establish Data Base Talent Numbers undertaking training Increased Training	New Training Year 2010
Branch engagement GMB@Work Branch Development Plans	Develop 4 Geographical Areas Meetings Branch Secretaries collectively within geographical Areas	Existing	Regional Secretary Regional President Finance Officer	Attendances Meetings All Branch Secretaries	Begins January 2010
Quarterly Meetings Officers & Staff Performance Review Region	Continuous Improvement Monitor/Evaluate	Existing / In-house Provisions	Regional Secretary	Buy-in Improved Communications Improved Team	Continuous

Strategic team objective	Team Action Step	Resources Required/Available	Person(s) Responsible	Measures	Timeline
				Working	



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