ORGANISING WITH 2020 VISION:

Case studies of new approaches to union growth and capacity building

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Futures Network

The Futures Network has been established by to facilitate collaboration and exchange of ideas and learning among unions in relation to innovation and growth.

The Futures Network:

- Fosters and facilitates collaboration and the learning of new techniques to increase membership, focusing on failing and learning fast in the pursuit of growth.
- Encourages the application of a suitable methodology and reporting on projects so the right lessons are learned.
- Brings together innovations from across the movement to ensure the pollenisation of best practice and learning.

To be involved in the Futures Network in 2021 and/or add a case study to this living collaborative document please contact atui@actu.org.au.

Contents

Introduction

2020 is a year marked by the COVID-19 pandemic, not only a public health crisis but what has been the biggest workplace issue of our lifetimes. In addition to the dire impacts on life and health are the upheaval and disastrous impact on workers.

Yet, with new industrial and health and safety issues constantly emerging in workplaces around the country and unions at the centre of national discussions, workers are not only contacting unions in record numbers - it has been reported that workers are joining unions in record numbers. It has also been a heightened period of union activism with workers standing up and taking action across the workforce.

Earlier in the year and as the impact of the pandemic began to be felt, Chris Walton and Belinda Moore launched their important discussion paper *Rise! Harnessing the Collective Spirit and Collaborative Power of Unions to Empower Australian Workers*.

The authors of Rise! argue that seismic shifts have occurred recently, not only with the composition of the workforce and modes of employment but with the generational change in the workforce. These have fundamentally changed workers' expectations of unions and every other organisation with which they interact. Workers expect to see a tangible and compelling value proposition before making financial commitment. They are loyal to people not organisations. One-size-fits-all does not work; what they seek might be different depending on their career stage and particular interests, not just workplace, occupation or industry. Difficult or clunky online processes are judged harshly.

These fundamental changes come at a time when many unions were already actively experimenting and building capacity in new areas to enable them to use new tools and systems to power up their organising and campaigning to improve membership retention; many beginning to achieve growth.

In many cases, shifts that were already happening have been accelerated by the situation in which workers and their unions have found themselves this year. With access to workplaces limited and more workers working from home, more meetings are held over video-conferencing platforms, in some cases enabling wider participation. Rather than supplementary to traditional organising, online organising in many cases has become the only option.

As a movement, Australian unions have not ignored the need to adopt new strategies or to innovate. Along with emphasising the importance of delegate development, 21 years ago the *Unions@Work* (1999) report from an overseas study tour delegation, called for investment in IT and call centres to handle inquiries efficiently and undertake outbound calls. The subsequent report *Future Strategies; Unions Working for a Fairer Australia* (2003) further developed these recommendations along with specialist organising teams and lead organiser positions.

During 2020 Australian unions have shared many of their projects which have been presented in the Innovations Series - a series of weekly webinars with the objective to "challenge our thinking and build our toolkit for union growth in a connected age". We thank unions, their staff and officials for sharing them. The ACTU's Futures Network will provide an ongoing forum for unions to share what they have learned from new initiatives.

As well as collaboration between unions, these case studies reflect the importance of cross-organisational collaboration within teams. The work of organisers and organising craft is evident, and indeed central, in these case-studies. Many examples demonstrate what is possible when we bring organisers and organising expertise into the digital world.

Over the course of the series, we saw how through a systematic approach to onboarding and retention, one union turned a declining branch into one that had grown by 1000 in a year. Another used a new membership database with a retention call centre and peer-to-peer SMS doubled its success in converting potentially resigned or unfinancial members to retained members.

One union built a new digital-first membership model for a particularly casualised and fragmented industry, which has grown steadily from 200 to 1000 members. Elsewhere, automated email journeys have improved the ability to convert student members who signed up on campus into full members once they started work. Another example combined these onboarding journeys with segmentation and extensive professional development programs, depending on people's career stage, to dramatically improve both recruitment and retention. Geographically targeted Facebook advertising generated leads for organisers to follow up, as did online forms for campaigns that data-matched and create potential member lists at specific workplaces.

These innovations were not focused exclusively on digital and technology. Other examples trialled new methods to connect with and organise migrant workers to fight exploitation and wage theft, and also to introduce young people to the union movement.

There are no silver bullets and there are no shortcuts. Nothing will avoid the hard work of organising. But as this volume of case studies shows, there are certainly new ways of organising that can be scaled up to help unions build capacities in new areas that accommodate the rapid changes of recent years.

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PART ONE:

ORGANISING WITH A NEW TOOLKIT - NEW METHODS AND STRATEGIES TO BUILD AND TO GROW

Hospo Voice – getting active on Slack

As COVID hit the hospitality industry hard, Hospo Voice looked to turn the crisis into an opportunity to mobilise activists to campaign on their issues. Hospo voice used person-to-person texting to bring workers into its Facebook groups, where they could come together and plan. However, as the Facebook groups doubled in membership, they became unwieldy for the purpose of mobilising activists. Despite actively monitoring who was being admitted into the Facebook groups, they needed a space where only their committed and newly committed activists could be gathered virtually. Slack, which provides a free option and allows different 'channels' and messaging between those on it, was deemed a safer space than Facebook for the activists who were keen to take action and speak freely. Slack enabled Hospo Voice to choose who joined in planning and leading the local actions.

Strategy

Slack worked to facilitate part of activists' organising journey. It is used as a meeting ground for the initiated, for those who understand the causes. Discussion threads and organising conversations could be facilitated.

Hospo Voice, Australia's first digital union, brought together mostly younger workers in Victoria working in a sector that has been historically fragmented and unorganised. The key issues used to organise are fair pay – tackling rampant wage theft in the millions of dollars; safety and respect – dealing with harassment; job security; and dealing with the casualisation endemic in the hospitality sector. Traditional organising struggled to meet the challenge of fragmented workers in small workplaces with high turnover, hence the need to use digital platforms.

Hospo Voice activists encourage workers to step up with action in their local communities, such as joining in rallies, poster runs, snap protests, demonstrations and social events. These events were created on Facebook where people could confirm their attendance and interest in taking an active part in the movement.

Hospo Voice uses Slack as an exclusive activist space for those who are keen and excited to embark on an activist journey, separate from the Facebook groups. This is where activists hatch and share their plans to win, away from prying eyes.

Campaigns using Slack to mobilise included Post COVID – the Put Your Aprons Out campaign highlighted the stories of those hospitality workers who missed out on JobKeeper. Activists were able to arrange the logistics of gathering aprons, stories and painting the aprons, then display them at prominent locations, all via Slack.

Other campaigns were Criminalising Wage Theft, and No Worker Left Behind.

Resources, systems & capabilities

Hospo Voice maintains its low fee structure, with only a Digital Organiser initially, later adding member organisers, seconded to Hospo Voice from other parts of the UWU during campaigns.

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Lessons learned

Hospo Voice found that Slack could be used to gather groups and rally them to action through weekly Zoom calls, polling members, with event calendars adding functionality. **Zoom group calls foster engagement and make it easier for activists to continue mapping out plans.**

Using Slack allows the union to segment activists into action groups based on what they care about deeply. Segmenting the activist communication by channels, the union was able to promote engagement. Additionally, it brought focus to the engagement as activists would see posts specific to issues that motivate them, without getting caught up with the different actions, as would be the case in a Facebook group. This demonstrates the value of using Slack as a space for action.

Hospo Voice found that keeping the engagement high over time was challenging. **With 450 people on the channel in July 2020**, the number of active participants was lagging after some weeks. Engagement was boosted as member organisers came online and other organisers were seconded.

Ensuring that activists were adept at managing their notifications, keeping the focus on building friendships and keeping a balance between fun and serious content were all key to maintaining engaged activists and building energy in the groups.

Digital tool optimisation:

The largely young membership of Hospo Voice is tech savvy and readily adopts new digital tools. Other unions with older members who are not eager adopters may find that this takes longer. The training focused on familiarising activists with notifications and basic skills in using Slack posts and discussions as organising conversations and was key to the Slack channels being able to foster action.

The add-on Eventbot calendar tool was more effective to ascertain turnout among activists.

Hospo Voice is now planning a member-only channel on Slack.

> **Group calls foster engagement and make it easier for activists to continue mapping out plans.**

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Online tools to organise in the CFMEU Manufacturing Division – examples from two sites with limited access

Background

CFMEU Manufacturing Division used online tools in two very different cases and was able to refine its processes and do what works more effectively with these.

One was an example of limited access because of Covid-19 stand-downs and gaps in language resources. The second was an example of access issues due to the geographical remoteness of the site. The primary staff resources on both case-studies were organisers with limited technical expertise.

SPL laundry site - plan to win

Industry: At the SPL site, the union had only recently begun organising, **80 per cent of the workers were on visas which made them ineligible for JobKeeper, and 183 of them were stood down when JobKeeper left them behind in April.** There were five major language groups among the workers, not including English. The site worked 18 hours in various shifts so having translators available when workers were available was prohibitive.

Analysis: Three main challenges:

- To grow membership while building leadership skills, modelling the kind of participatory union the CFMEU wanted to build.
- Improve workplace rights with most members stood-down without pay.
- Find a sustainable way to address the gaps in language resources.

Strategy: Keep the organising principles that work offline (high participation, member education and solidarity, one-on-one conversations, building leadership, member will fight on widely held, deeply felt, winnable issues) but engaging with person-to-person text messaging, with translation for major language groups;

Using old (survey) tools in new ways: Typeform usually employed

Campaigns: JobKeeper eligibility for migrant workers on visas, and return-to-work campaign for those deemed ineligible.

Engagement tactics

Using the *Itranslate* **app, an imperfect solution to 1:1 conversations by text**. This allowed organisers to speak to members and potential members but also members to speak to each other even if they did not share a common language. As software translation can be garbled, CFMMEU organisers and activists warned workers at the start of the conversation that there might be some unusual translations because it was an electronic translation and to just let them know if anything wasn't clear. **Workers were prepared to deal with the odd translations as it allowed for immediate connection with their comrades.** Strong activists then used the tool support their colleagues and grow their short list of contacts.

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As an alternative to meetings where new members and activists could be actively involved in decisions about the workplace, CFMMEU **used *Typeform's* customisable user interface to poll the workers, delivering questions in different languages, tailored by its *Logic Jumps* (a feature that enables users to 'choose your own adventure')**. This enabled the union to send one link to all members but customise their experience within the survey.

Resources, systems & capabilities

- **Trained staff** – Lead organiser (0.3), organiser (0.3) and nascent activist structure
- **Digital campaigner and communications team** – advice and support from National Office staff on listbuilding activities.

Lessons learned

Don't let the perfect be the enemy of better: The disadvantages of the Itranslate app created engagement as workers sought out the activists for clarifications on stand-downs and JobKeeper eligibility.

Use old tools in new ways: Repurposing Typeform surveys to be an alternative to meetings with workers while keeping the questions short, and asking workers to prioritise issues on a scale of 1-10. To ensure that workers didn't stop completing the surveys, organisers used different colours and images to differentiate surveys. Surveys also had to be clear and get straight to the point, not everything is appropriate as a mapping exercise.

Organisers prioritised problem solving: When attempting activist meetings online while catering to diverse groups of workers, CFMMEU was able to gather activists from various workplaces with language barriers over Zoom, despite early misgivings. Workers with similar language backgrounds were paired and guided through the discussion using translated slides.

Scaling the initial success is the next step. This was a new model for the union, that helped it continue to grow in a priority area despite limited despite access and language issues. Importantly, **all the organisers involved in the trial now hold the skills to roll out most of this model without assistance.**

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Timber pulp and paper processing in Tumut

Background

The Tumut case-study shows that in a regional area where the organiser is not locally based, digital tools can rejuvenate the organising practices and re-engage members who had become largely disengaged.

Membership density increased from 40 per cent to 74 per cent among employees, and to about 50 per cent of the contractors who had not been organised previously.

Three new delegates and a pipeline of leaders was also developed.

Tumut sites - strategy

Industry: There are close to 200 workers onsite at the pulp and paper mill in Tumut. About 120 are directly employed, the rest are contractors. The CFMMEU had a limited long-term core of members who saw the union as insurance but activism and collectivism had been discouraged by anti-union management.

Analysis: Two main challenges:

The employer, both management on site and in the corporate office were known to be anti-union. A previous active delegate had been sacked and members were reluctant to put their hands up, lest they be targeted.

The Enterprise Agreement had been delayed, first by the threat of bushfires earlier in the year, and then by COVID.

Strategy:

1. Together with activists, CFMMEU mapped its previous offline process with a view to moving it online.

2. Together the organiser and activists moved their processes online, which in practice, is summarised as:

- **A short survey to check issue is widely held, deeply felt and winnable.**
- **A letter sent to management that is sent by SMS to all members.**
- **Representatives coordinate local actions on-site, to reach a resolution.**
- **The outcome - the resolution is texted to all members within an hour.**
- **Representatives send the SMS to potential members and urge them to join in the fight.**

Engagement tactics:

Over six months as organisers adopted the online process, it enabled them to prioritise collective issues that people were willing to take risks for focus on issues, avoiding those not widely felt, therefore keeping its powder dry for deeply-felt issues.

Importantly, the process showed members that issues gained traction only when the members participated and acted 'in union'.

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Resources, systems & capabilities

Trained staff – Lead organiser (0.1) and nascent activist structure

Lessons learned

- **Too much activity at semi-organised sites happens in secret, use online tools to amplify it**.

Tracking how the workflows when offline is the key to making online organising more accessible to more of the union.

Similarly to a member journey, organisers need a pathway to using online tools that starts with their current knowledge, builds on that, results in a win and then motivates them to be more ambitious in their plans.

SDA National Digital Organising Project – adaption and expansion during COVID

During the first few months of the pandemic, the SDA reached **5.5 million workers through its social media platforms, had 1.2 million engagements, 1100 new likes on its Facebook page and signed up 2379 new members** *online* in addition to the strong growth through other channels. The union's campaign for recognition payments has secured additional payments worth $100 million for retail workers which would have otherwise formed part of the profits of the big retail companies. In addition, **the union built its capacity by identifying and training many leaders in digital organising.** This came through a combination of heightened workplace issues in these crucial sectors along with challenges to union's normal work forcing the rapid adaptation of plans which were already under way.

At the start of 2020, the SDA was implementing a National Digital Organising Project. It employed seven branch digital organisers (one in each state or territory branch) to embed the work of digital organising in branch structures and also as part of its established organising program. This expansion of **digital organising was done consciously, with the intention that digital organising not be seen as separate from the day-to-day work with delegates and members on the shop floor.**

Campaigns

As the pandemic hit, the SDA launched successive campaigns, the first being for paid pandemic leave – crucial in an industry with the level of insecure work of fast food and retail, and one with a public health imperative, so casual workers were not compelled to attend work while feeling sick. Early on, **more than 12,000 workers signed on to the campaign in support of paid pandemic leave,** and a paid leave package was achieved at big employers such as Woolworths, Kmart and Target.

Soon after, the union joined called for a retail rescue package closely followed by the campaign for a wage subsidy. This was supported by employers including the Australian retailers Association, and, combined with campaigning by the union movement more broadly - directly led to the Government's JobKeeper announcements. While imperfect, JobKeeper has been critical in maintaining ongoing employment for many SDA members. The SDA's online campaign for a wage subsidy was supported by 11,000 workers. Particularly in the discretionary area of retail, thousands of jobs are only still there because that wage subsidy was in place.

As retail workers continued working, campaigning ramped up to address numerous issues around workplace safety. While the government advice to most workers was to stay at home, this was not possible for retail workers, so the campaign to ensure COVID-aware practices and proper infection control procedures was of crucial importance. The union called for measures including cash-free payments, floor markings for social distancing, provision of hand sanitiser and PPE, and regular cleaning and sanitising of workplaces. The crisis made the "no one deserves a serve" campaign against customer abuse and violence even more imperative.

On safety issues, most of the major brands did take up the union's recommendations. **The 10-point plans for safety led to interventions on the shop floor with delegates and workers, which had widespread success.** These were followed by similar safety plans in shopping centres and fast-food outlets.

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Retail workers as essential workers

Underpinning much of this campaigning – and to great impact - was campaign messaging that repositioned retail workers as essential. The SDA began to create and share content about the critical role its members play in society. This was to awaken members to the idea of them being essential; the recognition that retail workers are critical to a functional society. Members received an enormous amount of support from the public. As well as the online petitions on specific issues, encouraging members to participate with photos with signs stating "I'm an essential worker" were popular and wide-reaching as were invitations to tell their stories. The purpose was to call out the fact that retail workers are expected to go to work while others may stay home – and they should be paid more for that. But all the campaigns for respect and recognition are only helped by a recognition of retail workers as essential workers.

When the union called for an essential services payment, the economy was struggling in many areas but that could not be said for supermarkets, which were thriving. **More than 40,000 workers quickly signed up to support the essential services petition. Social media posts engaged about five million workers. This campaigning created sustained traffic to the inboxes of social media accounts, which enabled further online-to-offline organising opportunities.**

While no retailer paid the $5 an hour recognition or essential services payment as per the claim, the union won extra payments at many major retailers, first with Costco which started a payment of $3 an hour. **Through these above-award payments and through active campaigning by workers, employers have been convinced to pay - by the SDA's estimate - about $100 million extra to retail workers.**

Another angle was added on June 19 when the Fair Work Commission announced a wage freeze until February 2020 for retail and fast-food workers, which led to outrage among retail workers after their crucial work during the pandemic. Thousands of workers have supported a campaign for employers to pay a wage increase from July 1 anyway.

Integrating strong communications with online and offline organising

Strong responses to online campaigns, such as the 11,000 who had supported the wage subsidy petition, represented leads for organisers. The SDA was able to use its new capacity in the digital organising project to adapt to the new environment, integrate its communications, build membership and strengthen its issues-based campaigns.

The SDA focused on communications so its members were receiving frequent, quick information from the union. SDA used a number of methods during the shutdown to communicate with members. Zoom meetings were held following shutdowns. In the largest, 500 dialled in for a briefing on their rights, especially in relation to JobKeeper. **The union pushed out regular text messages to delegates, providing them with important information about the developing COVID scenario. Many texts also had a call to action.**

When some retail businesses were forced to close due to COVID restrictions, the union immediately planned Zoom meetings with members in shut-down sites.

At the conclusion of these Zoom meetings, attendees were sent a link to join a private Facebook group. A good example is an employee's facebook group formed for one major fashion chain. The initial Zoom meeting had 200 members. The closed Facebook group quickly grew to about 970 members. The SDA estimates about half were non-members. **This journey for non-members from Zoom to Facebook led to significant new member recruitment in the company. The SDA has also identified online leaders, in addition to supplementing the traditional delegate structure.** Other employee Facebook groups included one for a significant discretionary retailer, the leader of which is an SDA delegate.

After JobKeeper started, the SDA began to see lots of rorts in the sector, particularly in non-unionised companies. Another important source of leads came when the union set up a national report form for workers who thought they were being ripped off on JobKeeper, and ran an online information campaign. Organisers used this to identify organising opportunities in small brands. One was a jewellery retailer in SA where staff reported problems with JobKeeper. Organisers then had offsite meetings with members. Within six weeks of them making contact, the union had signed up 21 members from this retailer. They also discovered the workers were under a WorkChoices-era agreement. The union and its new members then started the process of terminating the expired EBA.

All of this online activity proved fruitful for identifying activists. One effective way was looking at people who tag others in a post, who are alerting their co-workers to a piece of information. The work of identifying activists was labour intensive with a lot of work in going through posts. But although it is online, it is mostly just applying organising craft.

Delegate engagement

The crisis changed the way SDA organisers and delegates perform their work but there were many different ways organisers and delegates continued and even scaled up their work. Organisers still had a big focus on visiting stores during lockdown, so integrated aspects to the work were crucial.

The SDA normally runs an extensive delegate development program with an emphasis on face-to face training which had been disrupted and had to be continued differently. During the pandemic it held delegate Zoom meetings, some of which had more than 100 participants.

While it had already been under way in a sporadic or ad-hoc manner, organisers began to set up WhatsApp groups with delegates. Some were quick to adopt, having been familiar with platforms like this, but for many others in SDA it was new. This necessity of circumstances further fast-tracked the adoption of these communications methods.

Looking ahead

The SDA continues to scale up the capacity of its Digital organising and places emphasis on **thinking about online and digital organising as just organising.**

Organisers should encourage involvement of potential activists, and digital organisers should be doing the same thing. The union is bringing forward plans to **roll out member-led leadership teams in every branch of the union – a critical part of its digital project, because the key to scaling this work for the SDA is member involvement.** One of the capacity challenges is that the union has so many leads and so many unorganised sites. **Zoom meetings have often been run as briefings so SDA is looking at ways to develop leaders and make these meetings more member-led.** Although there is always a role for paid staff in monitoring and for ensuring things are working correctly, **SDA wants its Facebook groups to be as member-dominated as possible.**

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Using LinkedIn to organise at the ASU SA NT Branch

As COVID closed offices in March 2020, an ASU organiser in Adelaide (covering local government, legal sector, call centres, social and community sector and job service providers) was restricted in connecting with potential members. Many workers were working from home as were ASU organisers. LinkedIn had been considered as an organising tool previously but meeting workers in person was preferred. The pandemic brought forward the plans to use LinkedIn. **The organiser had not used LinkedIn at all before March but since then, almost 100 members who joined the union in SA, have engaged with the ASU over LinkedIn.**

Almost half of the ASU's requests to 'connect' were accepted over LinkedIn. **This has led to online conversations and more face-to-face conversations in workplace visits.**

The plan

The sectors in which the ASU was organising had a high proportion of workers with LinkedIn profiles, even when they might not actively use LinkedIn.

The ASU organiser **used LinkedIn entirely for recruitment of members, by mapping out workplaces and reaching out to potential members, sometimes sending messages to existing members in the process.** The response from current members has been positive, as they realise that the ASU is trying to reach their colleagues at work and get them to join their union. Rather than choosing between traditional workplace mapping and LinkedIn, they used LinkedIn to fill in the gaps and identify workers that they want to contact.

At the start, effort was focused on a single workplace – the City of Adelaide. Workers there were contacted with a brief information message about the ASU. That initial effort was well-timed, as many workers had been seeking to join the union at the time. Encouraged by this, the ASU expanded its effort to other council areas and found there were several workers who held unions in regard, perhaps having been a member when working a previous job. Finding an active union for their workplace encouraged them to join.

Initially, the organiser created a professional profile and later the ASU added a profile as an organisation on LinkedIn. These profiles allow them to have a digital presence and make posts regarding workplace issues, which add context to the messages sent to workers. **This helps the ASU to establish credibility as part of a wider effort to provide workplace stability and safety during COVID.**

LinkedIn excels at mapping a workplace or complementing mapping efforts to identify people in specific areas. The ASU attempts to connect with these potential members, and initiates conversations about the union through direct messages. **Online petitions that were posted on LinkedIn elicited contact details for follow up conversations by email, or sometimes by phone.** LinkedIn acted as a funnel for potential members. While views or engagement with the content posted might not seem high, the effort has led to almost 100 new members since March 2020.

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Some tips with using Linkedin to organise

When invitations to connect on LinkedIn and initial messages to potential members are sent, those workers may 'connect' with an organiser's profile, despite not having read the messages. When workers are initially hesitant to be open with issues at their workplaces, organisers find that demonstrating ASU awareness of issues at other sites, encourages them to be more candid about challenges in the workplace.

To find workers to connect with in a specific sector, say disability support workers, **LinkedIn can narrow down the search to those workers who have that job title, and then filter for location and employer. This functionality makes it easier to segment by sector and area.**

LinkedIn can track engagements and help connect faces with names when visiting workplaces. The ability to filter profiles by workplace can make mapping a workplace easier. Further, the profiles also help organisers decide if a worker is eligible to be covered under the union rules and identifies workers who were eligible at one workplace who might have moved on to a different employer. The union can follow workers as they move in their careers, with many still being covered by the union despite changing employers. Before using LinkedIn, the ASU mapping of workplaces relied on combing annual reports, delegates and previous organisers passing on reliable details.

Resources, systems & capabilities

About 40 minutes a day is allocated to sending initial messages and connection requests over LinkedIn. People can take time to reply, and often do so after hours. Organisers then allocate more time to connect with those potential members who have replied or expressed interest in posts.

Initially, subscribing to a "premium" LinkedIn membership helped to make more connections. As the LinkedIn connections grew, ASU was able to view and connect further, taking advantage of the network algorithm of LinkedIn. As connections grew, the premium LinkedIn subscription was discontinued, which limited the number of connections and messages that can be sent. Premium membership allows users to send messages to others on LinkedIn who are not connected to them – but this was of limited use given that LinkedIn is one of the channels ASU uses in addition to traditional organising.

LinkedIn has a feature to create 'events' which can be useful in different ways. The ASU featured its briefing for workers in the local government sector as an event – with significant attendance and interest. These events raise awareness of the capabilities of the union and convey to workers the information they can access through their union.

In the post-COVID period, the events function has been useful to schedule workplace visits. Organisers can see who has viewed the event and might be interested to attend (even when they do not confirm attendance) and then focus organising efforts on signing up the specific members. These may be workers who have been messaged previously, who are prompted to join once they can meet face-to-face during a workplace visit.

Lessons learned

Workers in **white-collar sectors connect with a union organiser over LinkedIn more frequently than they have in face-to-face meetings at their workplace.** An advantage that LinkedIn has over other platforms, is that people on LinkedIn are polite and professional in contrast to the way people might comment or engage on Facebook or Twitter.

Workplaces where the ASU was already active had a better response to using LinkedIn. For example, workers in local government offices were more receptive to joining the ASU after initial contact on LinkedIn because they were familiar with the ASU. In other workplaces, such as credit unions, the workers were not aware of the union, which required further relationship building and introduction of the union to those workers.

At the start of the COVID lockdowns, the union communicated with potential workers around the job insurance motive, suggesting that the union was how they could build strength and have their jobs protected. However, as the situation ameliorated in SA, they changed the tone of communication to general organising conversations, to match workers' changed expectations.

Interestingly, LinkedIn provided connections with relatively **senior workers who were willing to have confidential conversations with organisers, as 'whistle-blowers' – conversations that would previously have not happened**. These workers are those who are pro-union but were not signed up. When the union connects with them on a platform that is seen as professional, they are eager to engage and sign on.

The time between connecting and joining can be drawn out, with replies to 'check-in' messages not very frequent, and on occasion taking nearly five months. However, these conversation starters are still useful as despite not replying, workers may engage later and join.

The ASU tried paid advertising on LinkedIn, to enable posts and events to reach a wider audience with its messaging. However, they found that these lacked the personal touch that is required to make connections online. Much of the organisers' time spent using LinkedIn is in adding personal touches when sending messages that are sent to a wide audience.

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United Workers Union – adapting to organising in a pandemic

When COVID-19 hit Australia, UWU organisers found themselves shut out of many worksites and the union knew they it would have to adapt quickly to organising in a new environment.

One of the first measures priorities was to deliver the "New organising and member power" digital training to organising teams, teaching them how facilitate a big meeting over Zoom and how to use ThruText for peer-to-peer bulk SMS.

This assisted in contacting members, many of whom were already poorly paid, were being stood down and losing work. ThruText became important in assisting members through their immediate issues, such as guiding them through the Centrelink process. The union set up a job match website, trying to find jobs for members, normally outside the scope of the UWU organisers' work.

The UWU held its first ever online mass meeting of all members across all areas early in the pandemic, which provided a foundation for the work that followed. It set up a "United against COVID" Facebook group, where members were able to campaign on issues such as JobKeeper, and **a weekly online picket line.**

Industry snapshot: health and safety project

In one of its industry sectors, UWU called an urgent health and safety briefing on Facebook for all workers, inviting them to a town hall-style meeting to be addressed by rank and file leaders and academic experts. It invited members but in a low-density industry it also used sponsored Facebook posts.

More than 300 attended the Zoom briefing - 200 members and 117 non-members. Twenty non-members said they would join, 50 said they would be health and safety reps. On reflection, the meeting was probably too long (40 minutes) but it had interactive elements and the main aim was to identify activists.

Non-members were followed up within 24 hours and there was further systematic follow-up with smaller meetings and training.

The meeting and follow-up asked people if they wanted to be more involved, which led to them being invited to smaller meetings: a structured process of them coming to a meeting of five other members.

An education piece was also rolled out.

There was a small, expected drop-off from those who had initially put up their hands but **40 people became health had safety reps.**

On the night of the town hall meeting the **UWU created a health and safety Facebook group, which 600 people joined in 24 hours.** There was a real need for an interactive group that wasn't just a broadcast. A key thing that really worked was asking people to introduce themselves in the Facebook group. **The Safety Network (the private FB group) now has more than 1200 members.**

Lessons

Meeting online was a new thing for these workers. Everything was planned but it was still a case of trying something out and seeing what happened.

A very deliberate part of the **Facebook group was wanting to make it member-led, so before it was launched UWU identified and trained about 15 member leaders to moderate it.**

"UWU created a health and safety Facebook group, which 600 people joined in 24 hours.

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ASU NSW/ACT: growing a union branch by applying a model of organising during a pandemic

Workers in the industries represented by the ASU (NSW/ACT Branch) were seriously affected by the COVID pandemic and in different ways: by stand-downs, such as Qantas; JobKeeper; changes to how and where work is performed; working from home (fighting for it where it is appropriate and safe); impact of changing restrictions on workers' quality of work; work intensification; and, continuity of service.

ASU NSW/ACT recruited 1530 new members from March to May 2020 - 10 per cent growth in a three-month period. Many joined during and after **more than 534 Zoom meetings attended by 5861 workers**. Compared to same period last year it is more than double the number of new members, and in resourcing terms was the product of the work of 10 to 15 organisers as well as other staff.

A challenge for the ASU over this period was focusing its resources to growth while supporting members who faced some of the biggest workplace and industrial issues.

The challenge to existing organising methods

The ASU recognises that its **members mostly join when they are asked by an organiser at a workplace meeting. The union's most effective recruitment is around a collective experience.** During COVID, ASU organisers were unable to attend workplaces and organisers grappled with how they would acquire member leads.

The strategy: Industry – Employer – Workplace – Member

Before COVID, the ASU's strategy had a strong focus on sector-wide organising. For example, the community sector is dependent on government funding to deliver services on the Government's behalf, and the means of addressing issues in the workplaces had to be through government policy. If government funding isn't sufficient to pay for good working conditions, the ASU can have employers onside when it tackles these issues.

It is the same during a pandemic. The issues members faced, such as resources to provide sufficient PPE, required a government response. A similar issue was continuity of service. For workers to have that certainty required employers, supported by government, to have a plan for continuity of service for their workforce.

Members were engaged and they wanted to hear that the union's priority was to keep them working and maintaining their income.

The ASU's strategy for growth and member engagement was to achieve these wins at the government level and take them back into workplaces so that workers could connect the dots between the activity at each level.

Further along this multi-level strategy, it was important to recognise the individual member approach. Research shows the majority of members joined because they saw benefit to them in the advice, support and member benefits offered as individual workers. But over time, members say they stay **"because we are stronger together and what we can achieve together is far greater than what we would be able to achieve on our own."**

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While the union knows that the biggest issues are common across the sector level it can't negate the real urgency of talking to members about their real life and day-to-day needs.

The ASU's tiered model of organising - *industry - employer – workplace – member* - was a strategy that was supercharged during COVID, as was the importance of ensuring members drew the links between those levels.

When members and workers in a sector were asked about their needs, the union identified gaps in areas that had traditionally been filled by government or employers, such as access to training. **The ASU's Career Launchpad provided accessible webinar-based professional development and was a highly valued membership service.**

Underemployment of members was another issue with which the union had not traditionally engaged. During the pandemic, the union established ASU Jobs Connect, where members could talk to the union about their skills and they could be connected with organisations requiring a surge workforce.

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> **The ASU's Career Launchpad provided accessible webinar-based professional development and was a highly valued membership service.**

Tactics and methods

In the absence of public health orders limiting traditional organising and workplace meetings, ASU organisers source new member leads by walking into workplaces. During COVID, several substitute methods were used.

One of the issues the ASU took up was workers' need for information. People were confused by conflicting information from Government. For example, the State Government said community workers were essential workers, then the Prime Minister said he was closing community centres. **The ASU launched 1800 ASU4ME, a hotline promoted via targeted Facebook advertising to people likely to be working in the community sector.** Callers were provided with basic entry level advice and the union was able to engage people in a conversation about their workplace situation.

ASU used Facebook advertising for an industry-wide petition. For little cost it **reached thousands of people and from that about 200 potential member contacts. It had a 1-in-3 conversion rate to membership.**

The most significant source of new members was the continuation and expansion of workplace meetings on Zoom.

About 300 workers called into the first ASU industry briefing on Zoom. ASU presented its industry plan and the role that members needed to play. It asked workers to organise workplace meetings to ensure there was a continuity of service plan and that workplace safety issues were being addressed.

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Zoom meetings produced potential member leads. The attendance data could be overlaid with membership data. Knowing what data to collect in the registration process is crucial and so are organisers able to follow up with all of the members who participated in those briefings, to organise workplace meetings. **It is not the day of the meeting when people join – it is the tactics and the work done with members in the lead up to build the meeting and then the follow up.**

Organisers recognised that a "build it and they will come" approach does not work. The meeting needs to be part of the organising plan. Just sending out a link will lead to disappointment. Organisers helped with planning and to develop the agenda, to identify people to invite and involving members.

Over this period of growth, the Branch held between 30 and 80 Zoom meetings each week for members. These were a combination of industry briefings and workplace meetings but it was in workplace meetings where there was the deepest engagement. Recruitment came from the work in the lead-up to these meetings and in the follow-up. But again, research shows it is colleague-to-colleague contact that really drives the decision to join. A discipline was applied to the process –to ask members to identify and introduce organisers to work colleagues, and to ask these potential members to join.

Conclusions

The ASU will assess which parts of organising will return to "normal" and which of these adaptations will continue. One thousand members a week participating in meetings indicates that over this period the ASU has been able to overcome some existing barriers to participation among members who are time-poor or have difficulty travelling to attend meetings. But this does not replace the organising value of bringing members together physically.

The period has highlighted the importance of industry campaigns and making that work strategic and relevant to workplaces and individual workers, so each are able to see where they fit into that picture. **Growth is more likely when there are real and tangible wins for your members.**

Having a plan and a strategy is crucial to having these links in place: using the industry briefings to drive organising in workplaces. As follow-up to industry briefings organisers were able to ask highly engaged members to take part in setting the agenda for workplace meetings. For new members, the journey forms a narrative that the ASU is with them every step of the way. The real benefit is that members see the role they themselves play in the overall strategy.

There was increased recognition that while there are many keen members who will help organise, many are shy about asking people to join. Asking them to join an organiser in a meeting with their colleagues was effective. The ASU learned more about what it could ask members to do and now regards every member as an activist.

A strategy like this only works when every person in the union sees their own role clearly. Organisers have been good at driving the links of the industry strategy to workplaces, but industrial and communications officers, as well as the membership team, all have a clear role to play.

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Using peer to peer text in the UWU

Background

As notice periods for workplace votes (to amend Enterprise Agreements) that govern pay and conditions have dwindled to 24 hours, timing has become critical for organisers and workers. **Person-to-person (P2P) messaging can be 68 per cent faster in reaching people than calling them.** As many workplaces shift to online voting, the UWU has deployed P2P messaging to get in touch with workers at multiple worksites within a crucial time, such as when workers are about to vote.

People increasingly prefer texting to a phone conversation, especially younger workers. While organisers mostly prefer having a face-to-face conversation, access was limited during COVID and in geographically diverse workplaces. Using personal texting can replicate the person-to-person conversation. It is another tool, added to the organising kit to bring scale and efficiency, and as a response to the need for remote organising.

Plan to win - strategy

Analysis: Choosing between Broadcast SMS/Text Blast v P2P SMS

These tools matter when large groups of workers are dispersed over small sites. Text blasts are useful to send information quickly to large groups and can be partially personalised by inviting a poll ('yes/no' or 'choose a number') response. This tool requires no training or volunteers because it is mostly a one-way broadcast.

P2P suits situations like having a conversation about an upcoming ballot, following up with those who sign a petition, giving them the opportunity to take the next step - such as joining a group for action - or even to discuss a time to follow-up with a potential member. P2P texts engage members/potential members in a personalised conversation at scale and can be used: to collect information; initiate engagement; streamline replies; and, can be easily managed by volunteers from home.

Strategy: The following key points can make the most of the P2P tool.

Identify the specific group of workers: For whom are the messages intended and why the union is communicating, to clarify the outcomes. By defining the purpose of the campaign and the actions needed, you measure the right outcomes. Using metrics that are secondary, (such as likes, clicks, open rates, replies, or number joining an online group) can distract from the primary purpose of using the tool, which is linked to an action, such as how many took the survey or how many signed the petition. P2P reaches wide, but for deeper engagement, the conversation must move on, say to Zoom calls.

When drafting the initial message, the key idea is to draw the recipient into a conversation. The message is ideally a short introduction, which gives context using a question that requires a simple response. The conversation must have a human facet and not sound like talking to a bot. Automatic and recommended replies are best used sparingly, for adding factual information to a text conversation.

Digital tools tips and tricks:

When engaging with shift workers using P2P, the UWU sees a few patterns: they get a spurt of initial replies, which then slow. Later as workers finish their shifts, there is a sporadic increase in replies – which requires an organiser to spend 20 minutes each hour replying. As UWU often uses volunteers or a team of organisers working in turn, replies may be for a second volunteer or organiser to continue the engagement.

While some P2P systems can report on the data collated and compiled from the messaging, the quality varies and depends on the survey that is set up at the back end by those running it. ThruText can produce reports if the survey tool is used well. CallHub can produce better reports, but the training requirements are more onerous.

Organisers maintain engagement by looking for phone usage patterns among a particular cohort of workers, often through trial and error. Initially, among early childhood educators, organisers had only a 10 per cent reply rate when they trialled P2P messaging at the end of the work day. **Responses surged to 86 per cent when messages were timed for lunch breaks, between 10.30am and 2pm.**

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Campaigns:

The UWU tested the efficiency and effectiveness of P2P messaging compared to more conventional methods, by comparing efforts to get people to vote in the Marriage Equality referendum. In its test case in Victoria, it used a text blast with a poll to gauge how people intended to vote, which was sent to 12,000. The blast received 4400 replies and 3269 voted yes. The effort used 26 people for two hours, sending P2P texts, a total of 52 hours of effort. In other states the efforts required close to 600 hours of effort over a fortnight to mobilise 3125 to vote yes.

P2P in member recruitment: Different teams use P2P as part of recruitment plans and with tailored pitches. In a recent organising drive, organisers in the aged care sector in NSW recruited almost 100 members in a day by texting to non-members and former members using ThruText. In WA, those who did not respond to a similar effort were then added to a list on CallHub and called, with 100 of the 500 reached then signing up. An organiser in the UWU property services team communicates with non-members in a WhatsApp group to get them to join, with some success.

Further examples include:

- Organising workers to vote against a non-union agreement at Wilson Security, with 238 sites, 1500 workers, and a 24-hour notice period.
- Four health sector organisers in WA had 2500 meaningful two-way interactions over four days in April 2020.
- A recent drive where the UWU had 50,000 conversations with members across the country using ThruText, which enabled them to segment groups to give them the right information in relation to workers being stood down.

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Resources, systems & capabilities

The UWU has trialled and used multiple services - Thru Text, CallHub, Rumble, and Hustle. It plans to trial Yabbr, which blends both text blasts and individual replies. It currently favours ThruText because it is the simplest for training volunteers. CallHub is used to link call functionality to P2P texting.

Lessons learned

The UWU found that even when engaging with a cohort that was presumed to be likely to prefer direct calls, such as **school cleaners in regional NSW with an average age over 55 and largely from a migrant background, 86 per cent of those workers replied to messages within 25 minutes.**

ThruText costs 18c a message. Other services like CallHub are similarly priced but with added functionality.

CallHub has a suite of tools that include broadcast SMS – both one-way, or with poll responses - phone bank functionality, and even robo calling. ThruText is only a messaging service, but is simpler to set up, and marginally cheaper per message sent. The UWU had first tried P2P messaging with Hustle, then transitioned to ThruText, then found the added functionality of CallHub useful in certain contexts.

As an organiser starts with P2P texting, each is allocated a list of 30 to 50 people, depending on their technological prowess. Once the organiser is adept, they would be assigned a list of between 200 to 300, on the assumption that they would have about 100 conversations over two to three hours. At that rate, the schedule is planned around a very busy first 90 minutes, and after that about 20 minutes each hour for a further three hours.

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List building for organising & digital marketing in Professionals Australia

Background

An early step in organising a workplace is to map it and create a list of the potential members. The big funnel concept used in reverse marketing uses a range of tools to extend the traditional workplace mapping used widely in the union movement, to get workers on a pathway of engagement and ultimately, membership. In a campaign by Professionals Australia (PA), it had four organisers visit a workplace in Qld over three hours, making a real connection to members, but only one member joined after that visit. PA later used the list gained from mapping and augmented the campaign with emails tailored for members and non-members. The first few emails reinforced the campaign, and the need for working together, then later emails touted services and a special offer. After the email campaign almost 50 workers joined.

List building takes the process of mapping to a wider scale. What was done by visiting workplaces, is then reinforced online and done at scale by digital means and so is not limited to specific workplaces.

Plan to win - strategy

The list-building model in summary: the union puts together information and content such as reports, surveys, polls and campaigns, which are then distributed via social media channels and linked to forms that capture contact details. These are then added to a list on the database, which starts membership journeys through a series of emails. The automatic process of tailoring member journeys is easier when the website and forms integrate with the database; which in turn integrates with marketing automation software. **Integration is key to filling the funnel at the top as more members can be converted by tailoring the journey.**

List building and digital marketing without an up-to-date database and marketing automation tools can still be done, but it is more tedious when these functions are not integrated. **Automation made possible by the digital tools enables specific campaigns which can begin automatically when people are added to the lists.** When automation is not possible, the potential member needs to be added manually or a sequence of emails sent individually.

A list of more than 1000 translators and interpreters, who were urged to take membership of PA, was achieved after a campaign. As individual leads, each would then need to be emailed and followed up with manual effort and segmentation. Integration adds them to the automatic journey, with engagement levels tracked. About **3000 leads were generated when graduate engineers added themselves to a database by engaging a pay calculator. Following those leads manually would have taken a long time and the leads could have gone 'cold'.**

List building for organising draws on several techniques from inbound marketing. Professionals Australia used a range of tools and techniques to build large lists.

1. Identifying sources of traffic to the website using key search terms. Tools like Semrush will identify search trends. Google analytics can identify if people drop off in the joining process.

2. Online campaigns using surveys and polls are good list building tools because they are not site specific. In PA's experience, using a poll and survey on an important issue – engineer registration - it could ask members to make their voice heard by putting out a poll with the opinions collected going to government. This also allowed PA to harvest hundreds of contact details of engineers in a specific area, such as the ACT.

3. PA uses its audience's interest in pay and conditions in their industry, with an appeal to shape the future of the sector, by taking a survey of the scientists or engineers. The information collected is turned into a report, which can be repurposed as gated content.

4. Other examples of gated content are pay calculators in each sector. By using online visibility and marketing analytics software, it can find other key information that those in each industry are searching for, such as professional development and indemnity insurance. The survey of scientists attracted 1600 responses, while among engineers about 1600 filled details on the landing page to get the pay information and industry reports PA produced.

A way to start building lists is to use previous lists. People on the previous lists have had an interest at some point and may find value in a new campaign or an additional service.

Software tools can identify those who dropped off the join form. Webinars and meetings are a way to get people's details for the lists. During COVID, webinars on issues such as on OHS or leave entitlements while accessing JobKeeper, elicited the contact details of thousands of attendees.

Further enticements would be subscription options for updates, or follow options on social media channels for workers to engage with content to further fill the top of the funnel.

For instance, the Facebook channel of Pharmacists Australia has 10,000 followers, of 18,000 registered pharmacists. This allows **PA to place ads or gated content that has a potential audience of more than half the pharmacy profession in Australia**. Building a following on social media such as Facebook, LinkedIn or Google, enabled PA to target specific areas, by 'geofencing', using lookalike audiences to focus ads and then paying to boost the ads within the target groups. By integrating its database with an automated content management system, PA can segment content that goes to non-member lists from that which goes to members and what it sends to delegates, asking that to be shared at workplaces.

Resources, systems & capabilities

A modern database, an email marketing platform, website software that makes landing pages, content and services. Semrush is the tool used for online visibility/marketing analytics – which helps identify which key words work best when targeting ads and points out how they can be optimised for search engines. This software costs a few thousand dollars each year.

Automation tool Hubspot is used widely but PA uses Higher Logic Communications. Currently, costs as negotiated by the Union Innovation Hub, come to $6120 per 10,000 members. This expense easily pays for itself over a campaign of recruitment.

Lessons learned

The content provided is an engagement tool and does not imply a switch to a service model. It serves PA's recruitment to think of all content as a service that meets member needs. This in turn feeds the list building. In practical terms, PA identified a need among pharmacists for a union and pay rises. By listening further, PA gauged that to continue working, pharmacists needed registration and to meet professional development requirements. As it bundled those additional services in its member offer, Professional Pharmacists Australia saw membership uptake rise, with the union then able to negotiate pay rises and meet the basic need of the members.

Higher Logic's campaign tools, which do much of the automation and segmenting, allow PA's digital recruiters to track engagement with the member journey. Traditionally, activists are identified by assigning new members tasks and seeing who can do them. In a digital recruitment drive, there may be a list of those who engage on Facebook who are contacted directly.

PA prefers to set up member journeys, where recipients of emails are urged to forward, or engage in a survey or take a poll at various stages – with their activity on those actions visible. Using the marketing automation on Higher Logic, PA can build a 'persona' of engagement and then see who matches the activist profile and self-selects into that profile. By tracking actions such as which of those on the list do the forwarding, or whether any of the recipients open the emails a few times – PA can then target those who have identified themselves by this engagement. In **PA's engineer division, it was able to grow membership by 5.5 per cent for those not covered by an EA.**

Case studies in digital organising at CFMMEU

The CFMMEU successfully used digital tools including list-building techniques, Google ads and Facebook ads to gather data, recruit and organise workers in a range of contexts, including coal workers in a geographically remote location in Western Australia, visa workers in Queensland and forestry workers in rural Victoria.

Western Mine Workers' Alliance

This was an **alliance between the AWU and CFMMEU to recruit geographically isolated workers at mining sites in the Pilbara**. This remote context lent itself to Facebook geo-targeting (where ads were targeted straight to the mine sites). This also involved a "lead" form with conversion tracking which fed back into the Facebook ads. The details of workers who completed the lead form were passed onto an organiser, who called them within 24 to 48 hours. From that, the **Alliance was able to acquire new leads at about $15 each and new members about $60 each**. This was a particularly successful campaign for reaching those working in a remote area.

List-building techniques

Facebook geo-targeting was less effective with the manufacturing division because workers were concentrated in built-up areas and the geo-targeting reached too many people.

For this sector, list-building techniques were used. Petitioning is a highly effective tool and the union has refined its strategies around how it can use petitioning as a vehicle for recruitment and campaigning. Using an issue that workers care about, petitions are set up to elicit responses that are then used to generate specific data: contact details, industry, employer and postcode. Petitions can be used effectively at the micro level (workplace, suburb) to identify recruitment and campaign targets.

Visa workers in Queensland

The case of laundry workers at one employer in Queensland highlights the effective use of petitioning at a micro level. In this instance, workers on visas were laid off because they could not get JobKeeper; the employer kept the local labour. The union was able to capture data through a petition sent to those workers and then identify and sign up new members. Despite this petition only targeting a small community of workers (between 30 and 40) this list identified 20 as non-members. Non-members were promptly contacted by organisers with some signing up immediately and it is expected there will be more members recruited from this campaign.

Timber industry campaign

Petitions were used successfully to organise and recruit timber industry workers following an announcement by the Victorian government in 2019 which flagged a shutdown of the native timber industry. This obviously posed a huge threat to workers and communities in regional Victoria. This political campaign was spearheaded by a Save Our Timber Jobs: Save Our Timber Communities online petition which elicited about 600 signatures. While this attracted a large response rate, it was found that the data was not specific enough to assist organisers; hence it was promptly followed by an Email Your MP Campaign. This petition was set up to deliberately generate specific data such as the industry sector within forestry and their postcode. From the 2500 responses, the union was able to extrapolate that 1400 were non-members and they were also able to identity non-members by industry sector and geographical location. This micro data is particularly useful for list building and assisting organisers to target their recruitment drives.

Key lessons

Using online petitioning is an excellent strategy to gain a profile of the workers being targeted. The numerical size of the petition audience is less significant than the quality of the data; in other words, having specific data is more effective than data quantity. Consider what data you seek when you set up a petition; one that generates stock standard, generic data is far less insightful than tailored data. Ideally the petition should generate a worker's suburb or postcode, and industry sub-sector. The union can then use the data more effectively to target workers for recruitment and campaigning.

There are two crucial factors in getting workers to join online: the type of traffic (getting the right people to your website) and the rate of conversion, that is, ensuring they join when they get there.

Handy tips

Google Sheets is an excellent tool for managing data if you do not have an in-house developer. This plugs in automatically to AdWords and analytics to produce automated reports. These reports are an excellent diagnostic tool in determining where numbers are located and at what stage people dropped off in the digital journey and whether people joined the union and so on. YouTube tutorials are a good place to start for understanding the capabilities of Google Sheets.

If you are using Google Ads, pretend you are a potential member and use Google to try to join your union: What did you search? How many clicks did it take to get to the join form? Anything else you noticed?

> **Google Sheets is an excellent tool for managing data if you do not have an in-house developer.**

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UWU P2P text campaign during bushfire crisis

Background

The UWU was only two months into its existence post-amalgamation in January 2020 when the bushfire crisis was unfolding along the eastern seaboard. Proactive planning in the union's new chapter was swiftly replaced by how the union might respond to the bushfire crisis. The union moved quickly into emergency response, launching a widespread P2P text campaign to engage members in bushfire-affected regions. Ultimately this became a digital organising campaign around climate change which broadened the union's reach, created deep organising conversations and provided the union with data to mine for future organising initiatives.

Campaign messaging

A key decision was taken early regarding campaign messaging. Rather than describe the disaster exclusively in terms of bushfires, the UWU chose to frame it in terms of the climate crisis. This was a deliberate ideological decision. While perceived as a political risk, it was deemed that truth-telling needed to govern the narrative. The messaging around climate was also important because the UWU is a national organisation and members are increasingly affected by climate-related disasters. A **climate-related approach rather than single-disaster approach talks to more members and means the union has a blueprint.**

Campaign strategy

The priority was to get the basics right, including **critical OHS information regarding smoke haze, air quality and working in heat. Hazard alerts were disseminated via social media, email and through organiser and delegate networks.**

The next step was to determine how many members were directly impacted by the fires and to establish support strategies. The support included fee waivers, legal advice and financial assistance. **An emergency Climate Disaster Relief Fund was established with an initial amount of $500,000.** Priority was given to:

1. Members who had lost their homes
2. Members who were volunteers in their community

A key part of the discourse around providing financial assistance to volunteers was to highlight the industrial context; workers taking time out of their paid work to volunteer for the community should be entitled to paid emergency services leave irrespective of employment arrangements (permanent, part-time or casual).

Analysis of bushfire-affected postcodes revealed about 13,000 members were in bushfire-affected areas. From there the digital rollout to contact members was launched.

A Climate Action Working Group was established to resource a rapid engagement with members.

The union opted to populate a text to make it personalised, rather than use a broadcast approach. **This meant members were addressed by name and their geographical location rather than a generic text**. The initial message was a check-in on their safety and to ask if they had been affected by the bushfires.

Within 24 hours, a follow-up text checked if the first message had been received. This was done so members could dismiss the notion that the initial message was from a robot and made the engagement sincere and authentic.

The **rate of response to the initial text was 25 per cent**, which exceeded the union's expectations. Responses revealed the members were overwhelmingly positive and grateful that their union had reached out. **The follow-up text received a 50 per cent reply rate and in the case of Qld members, a 59 per cent response rate**, which was surprising given the fires had been severe there in September and October. The follow-up text increased the reply rate by more than 50 per cent.

The digital engagement with members enabled the union to alert them to the Climate Disaster Relief Fund; it also elicited deeper conversations about their workplace. What started as a conversation about the bushfires often extended to a broader conversation about workplace issues. At all times the messaging around climate crisis was highlighted.

Another focus of the strategy was to identify members who were community leaders who might not otherwise be identifiable in a workplace or industrial context. It was anticipated that leaders would emerge incidentally as part of the strategy. Ultimately this insight could better enable the union to capitalise on these networks for future campaigns, for example electoral campaigns.

The P2P text campaign created extensive engagement with bushfire-affected members and meant that members in regional and rural areas who were often difficult to access were engaged by the union.

Resources

The digital platform used was ThruText. It is free to set up and cost-effective at eight cents to send an SMS and free to receive SMS. The UWU has a not-for-profit account with ThruText which also makes it cheaper. The union budgeted $1 a member for the rollout but the cost was closer to 50 cents a member. The platform does not have call capability, but the union provided a phone call as required.

The technology is simple to use with a minimum of training and staff were given a script to guide member engagement. Through a compassionate engagement with members, the UWU was able to drive its narrative about the climate crisis and potentially have deeper organising conversations. Administration staff and other staff who are not organisers as well as a delegate at WorkCover were involved in the rollout and follow-up conversations.

There were 40 people sending SMS; 150 messages were sent each day over two days. Senders were having 75 conversations each day which was manageable. These conversations were mostly by text but also by phone depending on the member's preference.

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Lessons learned and next steps

The response rate from culturally and linguistically diverse members was just 10 per cent; hence, messages need to be in their first language. **Membership databases should indicate members' preferred language.**

It is worth noting that Tasmania has only one postcode for a significant area; hence, while members were identified as being geographically in a bushfire zone, some responded saying the fires were 400km away.

The campaign has delivered a lot of data for the union to analyse. The results will feed into a broader organising strategy and hopefully deliver insight into whether the members' needs are being met and if the union is healthy and growing. There is potential to home in on specific data as an ongoing organising and messaging strategy around climate. For example, a message could be sent to workers along the lines of: "It's 44 degrees in Mildura today. Are you working outside?".

> Membership databases should indicate members' preferred language.

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The member lifecycle at Professionals Australia

So much of what unions do is about moving people. In a limited sense this is about shifting people to become members and join the movement. Sometimes unions extend the sphere of influence to involvement in campaigns. However, with the expanding use of data across unions, the vision needs to expand. **Data provides a unique opportunity to identify where a member is in the membership lifecycle, and digital tools – together with traditional union methods – enable unions to shift members along the lifecycle map**.

Professionals Australia began much of this work, using digital marketing widely for a range of functions, from recruitment, to engagement and onboarding. This work continues, both at PA and through the Union Innovation Hub, where a data-driven approach is identifying lifecycle stages, and marketing automation is employed to shift members.

Applications

This importance of this approach cannot be overstated. Unions can use data to identify past members, or someone who has dropped off during the join process. Unions can tailor and target messaging and approach based on this additional information, lifting the conversion rate.

PA uses data to identify at-risk groups, such as disengaged members, unfinancial members, members who have recently completed bargaining of individual disputes, those who have changed employer, or who have changed categories and increased their fees. **These members are at greatest risk of leaving, and PA's digital tools can be put to work retaining them**.

Further, members may be in a good position on the member lifecycle and may be quite engaged with their union. PA then focuses on turning them into long-term members of the union, or identifying which can become representatives to grow the movement.

PA uses data, and digital tools to replicate much of the organising process. The difference is that the data-driven approach can be accurate in determining when a member is in a certain position, and a digital approach can effectively manage the scale of shifting thousands of members all at once, constantly identifying where members are at, and responding to shift them to a more desirable position.

Step 1 – Mapping

The first step is to understand the member lifecycle. This means understanding where workers could be sitting at any point in time: members, non-members, or even past members? New members or long-term? Engaged or disengaged? Financial or unfinancial? There are many more points that could identify something about each member.

How do members flow through their lifecycle? At each point on the map, where might they go next. For example, a disengaged member could resign, or ideally, they could be shifted to become engaged. Once this is mapped, start thinking about where current group of members and non-members sit, and where they should be.

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Step 2 – Data

In this process, data is critical. The data and the information collected about each member will help identify a member's position in the lifecycle map. Some of these points will be simple to identify. For example, a member might be recorded in the database as unfinancial. Other points are more complex to place, for example, disengaged members. This requires collection of information about every engagement with a member; every point of contact and every service used, every conversation or meeting, and every website login. This is not a small task. It is a complex task to collect thorough engagement data, and stick to these processes.

Unique data points can then be used to identify other positions on the map:

Non-members	—	Non-member email address
Past member	—	Non-member in the database as resigned or terminated
Join form drop-off	—	Email gained through join form, but form incomplete
Unfinancial member	—	Unfinancial status in database
Engaged member	—	Top 25 per cent of engagement scores in database
Disengaged member	—	Bottom 25 per cent of engagement scores in database
Reps/delegates	—	Recorded status in database
Long-term members	—	Member tenure over 10 years
Post EBA	—	Companies with EBA complete during past 6 months.

Step 3 – Move your members

Once the pathways are known and members or potential members identified, they can be shifted. Automated email marketing is the most logical way to handle this process, however this is most effective when a multi-channel approach is employed. At most points on the map, there are email addresses, phone numbers, often delegates in workplaces, allowing organisers to touch base with members in a range of ways.

With the member lifecycle stage being identified, the database will then know exactly where to send each member, and what kind of process needs to occur. Email journeys can be set up to trigger the moment that a member is identified at any stage.

Under this example, the moment a non-member email arrives in PA's database, a conversion email journey will begin, trying to recruit this non-member. Similarly, the database might identify a member who has fallen into the disengaged category, and will immediately trigger an engagement journey, tailored to this member.

Triggers may also be non-email, with various points on the journey populating call lists, or sending notifications to organisers or delegates.

The real value of this approach is that it systematises much of what unions have always done and ensures that it can be done en masse, for every single member, at every single stage. This approach can be a crucial tool in growing membership because it allows organisers to maximise recruitment by asking more people to join than ever. It has also allowed PA to build a delegate network by identifying engaged members who might be willing to get involved in a more active way.

Once automated processes are set up to handle each step of the journey, success can be tracked, monitoring the portion of members at each point, monitoring movement of members between stages, and working to maximise the number of engaged and long-term members.

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Processes

Conversion: Non-member to member

Remarketing: Join form drop-off to member

Win-back: Past member to member

Onboarding: New member to engaged member

Engagement: Member to engaged member

Re-engagement: Disengaged member to engaged member

Retention: At-risk member to engaged member

Unfinancial: Unfinancial member to financial member

Next best action: One service used to two services used

Activist identification: Engaged member to delegate/rep/activist

PART TWO:
"STOP FILLING THE LEAKY BUCKET" – A FOCUS ON MEMBER RETENTION

CPSU's outbound call unit

The Community and Public Sector Union's outbound call unit resourced with six full-time equivalent staff, has made a significant contribution to not only membership retention but to recruitment and to the union's campaigns.

Retention

The CPSU has devised a follow-up system for members whose payments have been rejected, based on two key principles: to make contact with all rejections as soon as possible, and that one-on-one contact is the best.

The **CPSU's membership system automatically generates call queues based on members who have become unfinancial.**

An important aspect is that different reasons for the payment being rejected should be treated differently. There is a different between "DCC" rejects and "DCC insufficient funds" rejects. The former means details such as a new expiry date for an expired credit card hasn't been passed on to the union by the member. The sooner you contact them the more likely it is that members will provide the details. The outbound team also used peer-to-peer texting as another way to make contact.

These staff also do cancellation/resignation and campaign calls. This means they are more able to have effective conversation with members during retention calls.

The **two "tops tips" from the CPSU are firstly that the sooner you make contact the more likely you are to be successful in retaining the member.** This requires having a system capable of automating the list being made available in the call queue. This is handled by the membership database.

The **second tip is to use peer-to-peer SMS for rejects. This is still effective because it is one-to-one contact.**

Campaigning for COVID leave for labour hire and casual APS workers

The CPSU's outbound call centre is an example of infrastructure that has been put in place and which has positioned it well for critical events. The outbound call unit was involved in campaign calls to support CPSU's campaigns, such as paid COVID leave for casuals. It also **performed a critical role in the recruitment of a large number of members from the newly appointed public sector "surge workforce"** which was deployed to administer COVID-related programs, such as JobKeeper. With contact details gathered in online and other inductions, prospective members were followed up from the outbound call unit, which uses calls combined with peer-to-peer text. **This resulted in strong growth for the union over this period.**

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AWU's retention call centre

In 2014, Campbell Newman's Government switched off payroll deductions of union fees for Queensland public sector workers. The Australian Workers Union, with a substantial membership in Queensland, quickly contacted thousands of members and converted them to alternative payment methods.

AWU identified it was important to have the structures and resources in place to do this on an ongoing basis. A decision was made to bring this capacity in-house.

In 2016, the in-house call centre in national office was initiated, including contacting unfinancial members. It now employs one full-time staff member and three casual staff - about 95 to 100 hours of call time a week.

For the AWU, the return on investment for its contact centre was proved. It learnt five lessons from establishing the call centre.

1. The important of data

Reaching people quickly is important, and this necessitates a modern membership database. In late 2017 the AWU switched to a world-leading customer relationship management (CRM) system

After this was integrated in June 2018, **success in membership retention doubled**. Automating the database meant getting to members quicker. AWU's first piece of advice in setting up a call centre is to examine your CRM/database. **If your database is not up to scratch then this work will be painful, and might take three or four years, but the results would be worth it**.

2. Using 2-way SMS

The **AWU has found two-way SMS to be an effective tool for its call centre**. Two-way SMS, as distinct from broadcast SMS, might involve saying "Hi Bill, I'm Jonathon. I'm from the AWU and your membership is about to lapse Do you want to fix this up now? Reply with yes or no". This question prompted responses from members.

There are resources on the Internet to assist with two-way SMS. The AWU uses Relay/ThruText and believes **it is important to personalise messages so that members do not think they are being contacted by a machine.**

3. Train operators in a structured organising conversation.

Operators completed ACTU training in structured organising conversations. **That training, including objection handling, was crucial.**

AWU now delivers this training to its operators. This was important because a membership officer might outline arrears and process payments, but when the objection was "I no longer see the benefit of membership" or "it's too expensive, or "it's no longer relevant", the only people who could handle that were people who were trained in handling objections but also knew the union and the wide range of industries it represented.

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4. The value of skilled operators.

Unions might have previously filled positions in call centres with university students, on the basis it was a casual position. The AWU found that the more training operators received, the more effective they were.

There are hundreds or thousands of people who have worked in call centres who have all of the skills to do the phone calls – even if they don't understand unions. **It's much easier to train someone in unions than it is to train someone in making the calls**. Give this function the resources it deserves and as part of that invest in experienced, trained operators.

5. Integrate the call centre with the rest of the union

The **call centre cannot be a structure that exists on its own, isolated from organising, campaigns and industrial**. The AWU works with field organisers so call centre operators can ask organisers to follow up.

AWU believes that moving people from payroll deduction should be a priority for unions, because it still poses a threat. Members who were on direct debit or credit card were more easily retained.

Invoicing members for back fees did not work. However, **waiving overdue fees for members prepared to re-join was a success – both economically and in member retention.**

The AWU's retention call centre has made big improvements to membership growth – and it was a big change. Members, however, considered that like every other organisation or company they dealt with, a call centre was the norm.

> " Waiving overdue fees for members prepared to re-join was a success – both economically and in member retention.

Member benefits team at the Services Union, Queensland

The **Services Union Queensland reported a growth of 1000 members in a year, attributable to a new membership benefits team set up three years ago** with a purposeful approach to retention and follow up.

For the Services Union, this **focus on retention was grounded in research.** They measured and found that on average it takes 10 points of contact to recruit a new member, which might comprise a series of phone calls, emails and conversations in the workplace. If members then resign within two years that was costly to the union. Focusing on retention was crucial.

Resourcing required

The member benefits team comprises four people who use a combination of means to contact members, including calling, SMS, emails and letters. Following up unfinancial members is a large part of what it does. It took on some of these duties from the membership team which now focuses on the adjustments and processing.

For the Services Union, the most important point was that the work was resourced properly. Part of that was a recognition that member benefits officers were doing a key critical intervention, with specialist skills. Membership officers could be reskilled for this work, but the skill in these jobs needed to be recognised in recruiting, selecting and training for these roles.

There were **two important aspects to the roles of the member benefits team – to make interactions positive and to take key preventative measures.**

Making it a positive process

The member benefits team makes on-boarding and welcome calls, three-months calls, campaign calls, and also recruitment calls, for follow-up from lists built by organisers and online campaigns.

In their conversations they talk to members like they are talking to a new member. Accordingly, callers needed to have organising conversation and objection handling skills.

Every engagement with the member had to be positive. With unfinancial members this included making them aware of fee waivers.

Past activities, such as letters of demand or referral to collection agencies created a negative image and should be removed from union processes.

Waiving fees allowed the union to keep on top of arrears, which previously meant writing off a big debt then carry over into new financial year. The Services Union had a realistic budget for bad debt.

Preventative measures

The team does multi-faceted retention work but it also has a commonality around the sort of experience members should have, that all contribute to an understanding of the intrinsic value of membership. For example, calls at the three-month point might include the member benefits officer pointing out that the member hadn't engaged in a particular member service.

Outcomes

Since the creation of the member benefits team, about 2500 members had come off the arrears lists, out of a branch of 12,000. The union now carries less debt by writing it off. Less than one per cent of the membership is unfinancial whereas previously this was four to five per cent.

During the past three years, the union has stopped the downward trend in membership decline because strategies have enabled them to stabilise and grow. In the 12 months to June 2020, the branch has grown by 1000. This includes a significant amount in the last three months of the financial year during COVID but even pre-COVID, the branch had grown by 600 to 700 members - just from the team talking to people.

During COVD the union has been able to consolidate its processes.

How the ASU is retaining members by engaging them in new ways

Background

The Australian Services Union found, through its research with focus groups, that most of those surveyed engaged with the union only if they anticipated difficulty in the workplace. **The ASU wanted to change that behaviour by engaging in positive ways so that members would turn to their union at other times.** It also found that members were looking to develop their professional abilities.

The ASU model of retention started by identifying which of its members were vulnerable to leaving. It found that **simple and systematic engagement that is relevant, well-targeted and high-quality in content,** substantially increases retention of members who would otherwise have resigned. The ASU has created a system of interactions with new members at key touchpoints, involving calls to members; benefits and services; introductions by delegates; and offering non-accredited courses for professional development.

The ASU achieved record growth in all its branches in the post-COVID period, following the pattern of members reaching out when hard times loom. **The new system of engaging members is geared to retain them.**

Plan to win

Analysis: Focus groups with members/non-members; surveys with new and resigning members; **A 'touchpoint mapping' exercise and systematic tracking of how and when members joined and then left, completed over 2.5 years**

Industry: A national federated union, with varied industry coverage, including blue and white-collar members and diverse age groups and demographics.

Strategy: Systematic, structured and tracked engagement, implemented via calls to new members; follow-up calls; providing access to a benefit or service; and professional development on the ASU Career Launchpad portal. Regional branches to pilot new engagement tactics, then scale up if successful.

Campaigns: ASU Career Launchpad.

Members access live webinars and on-demand videos, through the member Portal; they can access their training history and enables them to download certificates on completion - an extremely popular feature.

Engagement Tactics: As a result of vulnerable-member mapping, the ASU created categories for targeting its engagement. The mapping showed a need to plug the membership leaks by adding engagement that was relevant and met expectations. Engagement able to respond to the needs of members in a post-COVID period was also valuable.

- **Highly vulnerable - In the first year of membership (one-third of new members resign early); Younger members; members with fewer than three years of membership with no delegate or workplace union structure, or no EBA.**

- **Moderately vulnerable** – member for three to five years, with no delegate or EBA, in certain ages and sectors.
- **Least vulnerable** – member for more than three years, with a delegate, in specific age groups and sectors

Member welcome calls; delegate calls at three months; resignation calls

The new member calls are used to welcome members and pick up key data: why they joined, what they seek as members. The union caller informs the member about their delegate/organiser, then takes them up a rung on the ladder of engagement by having them access a member benefit or service.

Delegate new member welcome task

A delegate receives a list of new members and then seeks them out. While it seems obvious, in practice this step can be forgotten. A tracked checklist is provided to the delegate. Delegates introduce the union and themselves and let the member know of an EBA, or other campaigns. Delegates also assist members to access a benefit or service.

The Services Union trained its delegates to deliver this welcome and discovered that delegates found these interactions positive because it involved them in member induction. Members felt welcomed and valued by the union.

Key stat: A first call to new members increased retention by five per cent; a follow-up call increases retention by 10 per cent. The TSU branch in Queensland found that for the first four months of membership, the resignation rate for members who received both a welcome call and a delegate call was zero.

Member benefits and services

- Benefits such as free will kits, member discounts (Member Advantage, Union Shopper) and ambulance cover.
- Shows that collectively a union can negotiate good deals and support members through their working life.
- Do members care or use these benefits?
- It is worthwhile for a union to track who is accessing the member benefits and if members who access these benefits are still leaving.
- Find out what works, so that benefits can be tailored. It may be that certain benefits are accessed by members at a particular stage in life. For instance, there is evidence that members who are interested in wills are those who have become parents recently.

Resignation calls and fee waivers for financial distress cases

- Financial motivation for leaving is addressed and those members feel that the union has been pro-active in engaging with them.
- These member retention tactics are in addition to the day-to-day organising and delegate work.
- The key to effective use of fee waivers is automatic reinstatement of fees after waiver period ends.

Key Stat: Almost 80 per cent stay in the union after the period of waiver, when fees are re-instated.

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Resources, systems & capabilities

1. **Resource Intensive** – While some of the engagement tactics, such as welcome calls and follow ups are less resource intensive, the full range of engagement draws on the National Office which runs the professional development. Branches run the day-to-day administration of the program.

2. **Trained staff** – Some branches have specialist member retention staff who are trained to make intake calls and deal with retention issues. National Office staff with data skills track and analyse resignation data and seek trends and patterns for action, together with a national subcommittee of branch representatives

3. Trained and motivated delegate structure

4. **Member Benefits and Services Program** – Accessed through discounts such as member Advantage and Union Shopper, free will kits, ambulance cover

5. **Member 365 Portal** for ASU Career Launchpad: Adequate to the task; developed in Canada, troubleshooting needs coordination across time zones.

6. **ASU Career Launchpad** – ASU's online professional development

   › The Launchpad is delivered in partnership with the Teacher Learning Network, using Adobe Connect. Members register, get reminders and are surveyed on quality and satisfaction. They use Member365 Learning Management System, which is satisfactory. Course streams and topics are diverse. Examples include: Ignite your IT Skills; Delegate Toolkit; Managing Conflict; and Domestic Violence in the Workplace. Some courses were suggested by course participants through follow-up surveys. For example, 'Introduction to Strategic Planning' for which more than 400 members registered. The courses give members the opportunity to bond and talk over common issues such as stress management, bullying, conflict resolution, and dealing with difficult customers.

7. **Presenters** – chosen from subject experts, most of whom are external.

Lessons

Key Stats: ASU Career Launchpad and the system of structured interactions are effective engagement tactics. When a member registers for a Launchpad course, that member is 17 per cent more likely to maintain membership. When combined with calls to members and access to a member benefit, that rate is 26 per cent. For a member who has registered for Career Launchpad, accessed a benefit, had a welcome call, and has a delegate in the workplace, retention is 72 per cent higher.

The key lesson from the ASU's experience with engagement is to keep it relevant to the members and meet them where they are. Focusing on what is learnt from a mapping exercise, the following applies:

• Learn about members from their data, and once the analysis is done, take action. Some of what was learnt reinforced what was already known but some assumed knowledge was proved wrong. It is key to survey members and not repeatedly survey the same group.

• Take it step by step, do trials with a small group to see if the response has improved member retention, then scale it more widely. The ASU tracked what is being tested by tagging the people where engagement was being trialled, and then reporting and reviewing the engagement after a period. This iterative process allowed the ASU to record key statistics about their engagement actions, before implementing more widely.

- Member engagement does not happen in an automatic way. It is necessary to map the process from member recruitment and early expectations, and not assume that existing processes are working. The process of Touchpoint mapping helped visualise the process.
- Launchpad is a specific tool for the ASU with the single biggest impact (17 per cent increase in retention). However, phone contact is more widely applied. The online courses can be used to reinforce traditional union themes of community and the sense of collective belonging. Members across varied sectors participate and see others dealing with similar problems.

While the ASU had record member growth during COVID, retention is the key to the union's growth, through sustained engagement.

Member onboarding at Professionals Australia

Several years ago, Professionals Australia (PA) dramatically changed the way it approached communications with members. This moved the union's strategy towards engagement, building on the concept that engaged, involved members are far more likely to remain members. The first step in the engagement journey is onboarding.

Member onboarding is the process of welcoming members and introducing them to membership. It includes introducing all the services available that will likely be appealing to a given member and starting them on the journey of really belonging.

Members come to PA for a range of reasons. Often these reasons are specific, or focused around one issue or moment in time, like an EBA negotiation or an issue at work. Member onboarding can set up their experience and create a whole range of reasons why the member might stay on, even once they satisfy their reason for joining. This is an opportunity to build long-term, loyal members.

The process itself is more than just a welcome call or an email with their login details. Assisted with the use of email automation tools, it should involve several contacts, via multiple channels, and should occur over a number of months, or even the whole first year of membership.

Why is it important?

If member onboarding is done well, a new member will walk away from their first few months of membership fully aware of the union and what it does, aware of the three or four most relevant services and campaigns, fully aware of how to get value every day from membership and how to be part of something bigger that makes a difference. If members only ever have one reason, when that is satisfied, they might resign. If over the course of their membership there are a range of reasons to stay, then retention will rise. Even better, if there is an emotional connection where they feel part of their union, they will be 'sticky' members.

All unions have members who resign due to a lack of value, too expensive, not using their membership, not worth it. The member onboarding process addresses this issue pre-emptively. Ultimately, it is about longer-term members who are more involved in their union. And **union growth is built on retention**. Member onboarding is then the first step towards building a strong retention strategy.

What is the process?

Onboarding is not just an email or a phone call. The process needs to achieve something greater. And it needs to be comprehensive. It also needs to foresee issues in advance and address them.

To build an effective member onboarding process, these are steps to follow:

1. Understanding your members

What do members want? Do the homework. For the most part, this comes through surveys, research, conversations, and data.

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Regular surveys to members around their needs and their wants are important. Don't confuse the wants of staff in the union movement with the wants of regular working Australians who happen to be union members. Once a year at least is a sensible timeframe for surveying.

Surveys need to hit the basics. What do you think about your membership? Does it provide good value? Why did you join? Rate services on importance and then quality. What other services and benefits would be of value?

Research is a more detailed and might require online or face-to-face focus groups. Through this kind of research, there is an opportunity to directly ask members the things the union would like to know.

These can be particularly useful in testing ideas, as the discussion can start to pull apart an idea and work out any kinks.

Conversations with members are another obvious source of insight. This might be through welcome calls, calls to or from call centres, and meetings, both with regular members and committees.

Lastly, and not least, there is data. Tracking engagement or service use will yield data around what members do.

Build a picture of members and form a fuller understanding of who they are.

2. Define your segments

Segmentation is about a union understanding that not all members are alike and have different needs.

Segments need to be sensibly decided so that there is enough to reflect a group's common needs and interests but not too many that it is impractical. Common segments might include age, career stage, location, job and industry.

Ultimately, for the purposes of member onboarding, this will be about shared interests, and shared communication style.

For example, PA might have engineers aged under 25. These members share a profession, they share an education experience. They will be on similar income brackets, and they are at a similar career stage. They are relatively new to the workforce, and similarly they may be new to unions. Additionally, from a life stage perspective, most won't yet have started their own family, but it will be a future goal. PA uses this persona to work out what will be most valued by this group, and how to best communicate this value.

3. Mapping

Build out what the member onboarding process should look like. Design the welcome experience, and make sure to provide new members with all the information they need, and the way you can share it. **Schedule the type of contact and timing of contacts over the course of the welcome period, which might be six to 12 months.**

Establish intentions for the welcome process.

These might be:

- To make sure new members know their login details and log in to their portal.
- To familiarise members with four key services
- To have one direct phone call with the member
- To build a relationship with a new member over six months.

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Once the process is built it can be replicated across segments and help to build contacts. Each contact and result will lead to the next contact. For example, if a member did not open an email, send an "in case you missed it" reminder.

If a member has not logged in to the website, send a reminder with login details.

The best processes will build in emails, reminders, SMS, phone calls, and will explain a range of ways that a member can get the most from membership. They will also have strategies to head off gaps before they happen, such as the reminders emails.

Welcome calls are useful because they can be used to check off success of previous asks, such as logging in or opening emails. Then staff can have clear goals to achieve on the phone call, such as provide a warm welcome, ensure the member knows how to login. Remind the member of two services based on their segment.

4. Systems

The correct systems must be in place. Professionals Australia uses IMIS as its customer relationship management (CRM), integrated with Higher Logic Marketing Automation software. This is the same system used by the Union Innovation Hub. The integration between these two systems allows PA to automatically trigger journeys and processes, based on its database.

It feeds information about the member's progress back into the database to inform the next stage of the journey. Automation is crucial.

At PA, a new member is immediately created in IMIS. The new member receives an immediate confirmation email with instructions how to login and begins the welcome journey. The member receives emails with different content over the coming months, and a trigger goes to the call centre for a welcome call. The system checks off these key milestones, like logging in or call completions, and sends additional emails or prompts new calls if they are not complete.

5. Build your journey

At PA, Higher Logic Marketing Automation is used to build the journeys and automate contacts. The system will populate emails and contacts.

6. Refine

New members will now receive tailored welcome journeys to introduce them to their membership. This will help to build long-term, loyal members, who understand what their membership brings to their life, and are taking full advantage.

However, members change, as do services and campaigns. These will require changes to content and processes. By checking and refining, the process becomes more effective, and produces better results.

Outcomes

Member onboarding was the first and most significant step for Professionals Australia in implementing a member engagement strategy, and it was also the first foray into marketing automation. **Since its implementation, there has been a 12.5 per cent decline in resignation, and an even higher decline among members under 35.**

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PART THREE:

ORGANISING THE UNORGANISED – HOW NEW STRATEGIES, TACTICS AND MEMBERSHIP MODELS ARE REACHING IMPORTANT GROUPS OF WORKERS

Alternative membership strategies: a new union for musicians

Background

Musicians Australia (MA) is the new union under the Media Entertainment and Arts Alliance umbrella, launched in December 2018 to organise freelance gigging musicians, who comprise 90 per cent of music industry workers. They are predominantly contractors – often considering themselves small-business owners. These musicians often do not get paid for gigs, work multiple jobs, and earn less than $55,000 a year on average.

Previously, MEAA organised musicians only among orchestras, who are regular employees, with high levels of membership. Musicians Australia initially had just 200 members and limited resources, with 0.2 FTE of an organiser. The industry was mostly unorganised, though other organisations provided some services. Musicians frequently work second jobs, often music-related, such as teaching music. They consider unions favourably but membership was low due to lack of awareness, cost and value, and failed past attempts at organising freelance musicians. Non-employees do not need traditional IR support that was part of the package offered by most unions.

Strategy

Musicians Australia was developed after six months of research, engagement and testing before its launch in December 2018. A narrative of how the live music industry operates was extracted from that analysis, which informed the development of MA's strategy and subsequently its campaigns.

- **Analysis: MA u**sed key informant interviews, surveys, focus groups, and surveys on social media to test ideas, gain insight into the sector, and begin to grow a network of musicians in gig music work (as distinct from streaming, recording, and music teaching work).

- **Industry Narrative**: MA is a national union for live performance gig musicians, who are self-employed. These potential members are largely long-term performers, 62 per cent are male, with an average age of 44. A quarter of live gigs are unpaid and musicians surveyed received only half of their total income from music on average. One-third say that they are paid less than the agreed gig fee at least 10 per cent of the time. The average hourly rate received for commercial musical performance is $7.58, that is, $11.35 less than the minimum wage in 2018. Average annual income is $55,000 from all income sources, significantly lower than the workforce average. Two-thirds of respondents earn less than $60,000 a year, while 37 per cent earn $30,000 or less. They receive just 12 per cent of their income from broadcasting, streaming, publishing and sales. Of potential members, about 40 per cent live in NSW, 30 per cent in Victoria, 15% in WA and Queensland, and 5 per cent in SA.

- **Strategy**: The **strategy was to take an industry approach, with a country-wide reach, using digital tools to reach people on social media platforms that the audience already used**. The industry is geographically diverse so MA launched a digital membership with limited IR support and tailored services at $3.54 a week ($182 a year) for new members. This membership plan was costed and depended on growth. It was not based on leveraging services, but was about building power and member involvement and adherence to MA's Code of Conduct. This strategy informs the use of digital communications and choice of digital engagement tools.

- **Campaigns:** The 'Love Live Music' campaign helped raise awareness of exploitation in the industry, and tested ideas and best practices that were adopted as Musicians Australia's live music Code of Conduct. The next campaign will be run in two phases (but interrupted by COVID). The first phase – Stop the Rip-Off (2019-20) – is an agitation phase, aiming at building engagement and fine-tuning the ask from members (i.e. no undercutting, no unpaid gigs). Stop the Music (2020 onwards), the next phase – focuses on mobilising members to exercise market power via a member-only 'Gig Map', in conjunction with further research on business models and ownership.

Resources, systems & capabilities

0.2 FTE Organiser initially, now 0.4 FT, and a 0.4 Digital Campaigner/Data Analyst/Systems Administrator/ Software Developer initially, now 0.6

The value proposition of membership is largely derived from the social contract, with the added benefit that members can access public liability insurance (by leveraging the MEAA's buying power).

Digital Tools: Strategic use of **digital communication - target ads to reach workers on their preferred platforms.** Musicians Australia's website is where MA shares its plans to win. In practice, MA drives traffic to it from social media and by creating a landing page site per campaign (e.g. No Music Without Us). **The website will later house the Gig Map – a digital tool to crowd-source information on live performance venues (like Yelp, or TripAdvisor) for gig musicians.** Gig submissions will be accepted from all musicians, but an interactive map and table of gigs will be accessible only to members.

MA directs musicians to the website through various channels including Facebook Ads, Instagram, and Google Ads, with a view to collecting contact information from visitors via lead forms, powered by services including Typeform. Leads are also generated when prospective members are added to the linked Facebook Group, engage with posts, interact with a **Facebook Page chat bot powered by ManyChat**, use the live chat function on the MA website, or use an online booking tool to schedule a direct call. These leads are then contacted within a two-week period, and are pre-qualified by an email and SMS, which prompt them to schedule an organising call.

Facebook Ad Manager is flexible in terms of setting up targeted ads, enabling the creation of custom audiences (i.e. uploaded contact lists, such as lists of existing members, or musicians who complete a specific activity), and targeting based on who has recently visited the Facebook page or website. Musicians Australia typically targets Facebook Ads to a three per cent 'lookalike audience' (i.e. Facebook Profiles similar to a custom audience) created based on a custom audience of existing Musicians Australia members.

The types of ads that Facebook Ad Manager offers can be categorised into the various stages of the marketing funnel, which also illustrates the CRM pipeline that MA used.

Key stat: MA's lead conversion strike rate is 30 per cent but on occasion close to 50 per cent. From a low base of 200 members in December 2018, MA currently gains an average of 25 members a month, and loses about 4.

Customer Relationship Management system. The CRM is the hub of the digital tools - 'a central source of truth - that stores member and non-member information. This information is captured from the forms but can also be added manually from lists or other platforms via integrations. While MA currently uses ActiveCampaign, which it does not recommend to others, its Digital Campaigner likes and recommends **Hubspot**. As a union, MA's business model is similar to selling subscriptions, using the process of working leads through a pipeline towards membership. This is more akin to what businesses do than how most non-profits (that are not member associations) operate. The aim is to cast a wide net, collect contact information, pre-qualify people who could be interested in union membership, and then follow up with an organising conversation.

Online membership card. MEAA uses a custom-built digital membership system developed in-house. Based on research, its developer recommends **Passkit** as a robust and popular alternative for larger organisations.

Lessons learned

To maintain its growth, retain members and the viability of the low-cost financial model, **MA needs the right type of members to join for the right reasons, by being consistent about "what it takes" to win**. It brings musicians into leadership groups where those plans are discussed. The social contract is based on a values-driven strategy: that the members who join demand to be paid for gigs and also agree not to undercut other members. Membership of non-employee musicians has more than doubled and is on a long-term growth trend.

Digital Organising is informed by analysis and strategy. Building a website and choosing digital tools would not be suitable for the task without an understanding of the target group of musicians, live music fans and the venue owners. Further, knowing the demographics and geographic spread of the audience (to target Google ads), the issues facing gig musicians, the plan to win, the narrative, the branding and tone of voice are all needed, to drive messaging and campaign content appropriate to the audience.

Digital Tool Optimisation: In the experience of MA, CRMs with integrated tools are indispensable. MA recommends the value of features offered by the providers of commercial CRMs, that provide new features that track the customer lifecycle. If the CRM of choice does not have integrated tools, it needs to be able to have the functions from an application that can be 'bolted on'. The CRM needs targeted built-in communication tools such as click-to-call functionality, sending bulk text messages, making robocalls (if needed) and segmenting leads into lists. These were key, to maximise the efficiency of the single organiser working one day a week (now two) to convert leads into members.

Fighting exploitation and wage theft among migrant workers: Unions NSW's experience with Visa Assist

Background

Migrant workers are disproportionately affected by exploitation in the workforce, and typically unions have a low membership density in minority ethnic communities. The 7/11 scandal that broke in 2017 highlighted the scale of exploitation for migrant workers and raised the spotlight on systemic wage theft. Unions NSW, responding to the scandal, identified that migrant workers needed to be organised in a more tailored way, where their status as visa holders was addressed explicitly as a part of joining the union.

Strategy

Unions NSW conducted an extensive review of migrant workers and wage theft. Essential to creating a new model **was research identifying that 62 per cent of international students feared losing their job if they spoke up about wage theft. Further, 77 per cent of international students were paid below the minimum casual wage.** The responses led to exploring why migrant communities were afraid and prone to wage theft. Research concluded that migrant workers' status as visa holders in Australia was the key vulnerability. For unions to credibly organise migrant workers, they must address that visa status.

Unions NSW partnered with the Immigration Advice and Rights Centre (IARC), a community legal centre, to provide members with free legal assistance with their visa related matters. The concept was tested by setting up community meetings bringing together migrant workers and unions to share information about the new service and to encourage union membership. The presentations included promoting the new legal service but also assured migrant workers they were valued members of the working community. The Visa Assist program continues to improve its model by examining how it can build its outreach. It now has an extensive online activist network and recently launched its public-facing Facebook page, called the Migrant Workers Hub whilst also continuing to organise meetings at community halls and universities.

Visa Assist provides assistance for all types of immigration claims including, visa status issues and applications for new visas, Australians residency or citizenship. The value proposition mixed with community values provides a strong support network for an otherwise vulnerable workforce.

Visa Assist is made possible by a partnership with a community legal centre – the Immigration Advice and Rights Centre (IARC).

IARC's aim is for vulnerable people to receive fair and just immigration outcomes. Its services include: migration and family violence; partner visas; protection visas and humanitarian visas; other family visas; visitor visas; visa cancellations; citizenship.

Representation: Representation covers clients at the Department of Home Affairs stage as well the Administrative Appeals Tribunal in both the Migration and Refugee Division and in the General Division in relation to character matters and citizenship.

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Outreach: Face-to-face presentations to migrant workers have been highly successful. **When the offer of free migrant legal service is put forward there is more than 40 per cent uptake for union membership.** While the initiative has thus far not involved substantial amounts of digital recruiting or organising software, these resources are being developed to gain better reach with migrant workers in the gig economy.

Lessons learned & next steps

Continue to support migrant workers through IARC:

In 2019 financial year, IARC assisted 795 vulnerable people through legal advice. About 40 per cent of these were women and 1277 appointments were completed by the service. The union membership uptake for those who attended a community presentation was 40 per cent.

For unions interested in the service it is essential to invite organisers to presentations so they can see the value of the service and how it might be implemented in their unions.

Digital organising strategy:

Visa Assist plans to increase its online reach to communities. Given many migrant communities work in the gig economy, increasing online branding presence will be essential to cover all migrant workers.

Responding to COVID-19:

The 2020 strategy will examine how COVID-19 has affected migrant workers. Given that many international students and gig workers did not qualify for JobKeeper or JobSeeker payments, COVID-19 has placed migrant workers in an even more precarious position. The ability for migrant workers to have advice and counsel during this time has become even more essential.

> **When the offer of free migrant legal service is put forward there is more than 40% uptake for union membership.**

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Organising students and graduates with Young Professionals Australia

Background

Professionals Australia (PA) has had a student program for 35 years which expanded into its current structure in the past eight years as Young Professionals Australia (YPA). As it expanded its specialist team and member offerings, increases in student recruitment have become part of the core activities of PA and almost one-third of total new membership of PA is in YPA.

YPA operates through its access to university students in the fields of engineering, science, IT, architecture, pharmacy, and related fields through guest lectures on workplace skills such as leadership, communication, and project management. This access owes to key relationships developed over years with universities which allow an hour-long session, on industry skills. For students who join, YPA provides career services. These include one-on-one coaching, to assist those students who join at $48 a year ($4 a month) with the transition from university to the workforce. Further, YPA assists with job plans, resumé reviews, LinkedIn profile reviews, interview training, salary negotiations, contract reviews, salary advice, visa-related assistance, legal advice, member rewards and networking opportunities with the members of PA.

Strategy

YPA relies on recruiting students with the value of the bundled services and then retaining those into full members at its full fee. Post-March, after each student member of YPA graduates, they are converted to $300 a year graduate membership, with a 60 per cent retention rate, who in turn become $714 full-fee members of PA after two years. It retains 40 per cent of graduate members at this step, with 20 per cent of its graduate members who are international students heading overseas. **Over eight years, this process has added 1000 full-fee members to PA and student membership has increased from 4 per cent to 8 per cent of the total membership.**

One of its key retention strategies is for students to see paths through membership journeys as being key to progressing their careers. By doing so, student members can see the member pathway as being of continuous benefit, beyond assistance to find a job. PA focuses on professional development through its registration and so that graduate members link to career progression after they have found employment. Access to students comes through their guest lectures so they need to keep the quality of those high to ensure that students get an educational experience and learn trends in their relevant industries. This focus on quality interactions and events ensures that YPA can maintain continued access and meet the university criteria for guest lectures. Graduates have a six-month notice period for opting out of the upgraded membership.

Resources, systems & capabilities

YPA's program costs about $500,000 a year to run and brings in nearly $1.5 million in revenue a year. It previously offered free memberships, with those members then recruited to paid membership in 'conversion' seminars. **The move to a fee-paying structure, with specialist staff, has more than paid for itself.**

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The support that YPA provides, in terms of coaching and mentoring, requires staff to build personalised relationships with student members as the nature of services provided are one-on-one. There's an investment in staff capacity and relationships and contact with up to 1000 academics to provide almost 350 guest lectures a year. These are resource intensive because they must offer quality and compete with university career services, an employer association in engineering (which offers free membership), and search engines which also provide information that students are looking for.

Lessons learned

YPA recruits students on the value of its services, putting students on a pathway to full membership unless they opt out with six months' notice. As the fee scales up from student to graduate then full membership, YPA found that the fewer 'jumps', the fewer were their losses of memberships. PA concluded that most of its loss of membership was during these shifts, so removing many levels with different price points (merging graduate membership to a single fee), helped to retain more members and achieve the 12 per cent increase in retention among graduates. While this decision proved worthwhile, YPA was initially wary of losing members as students moved from full-time student membership fee structure to the graduate rate. The decision was based on member feedback that rated the value of membership highly and finding its members would not be price-sensitive at the point of going up to the graduate rate. This also led to increasing the initial fee rate to $48 from $20, to make it more costed and rational.

PA actively ensures a cost advantage to its members and touts that student members are able to save more in discounts than they pay in fees, given that the fee is tax deductible. As graduate members switch to setting up households following their professional studies, the discounts make the package of member benefits (Member Advantage, professional development, and course discounts) alone worth more than the cost of the membership. This also helps retain students who may have found a job and conveys strongly that YPA's services do not diminish once its members have found employment.

NSWNMA's conversion of students to full members

"We shouldn't force new members to wait until they start work to join. If they know when they're starting work, we should be able to let them join". Danielle Mahoney, NSWNMA

Workers joining a union early in their career is an important predictor of whether they remain a member throughout their working lives. Signing up students of nursing and midwifery into a free category of membership has long been part of how the NSW Nurses and Midwives Association maximises the number of new nurses who become members. But since 2019 a number of new measures to assist organising teams' recruitment of recently graduated student members has greatly increased its effectiveness.

Student membership

Student membership of the NSWNMA is free, and there are about 6600 members. Students can access a central member portal, resource guides, and library and research assistance to help with their studies. Also included is subscription to the union magazine, (The Lamp), scholarships and discounts for education courses.

While the free student membership does not include industrial representation, student members are able to access advice and assistance about their registration with the Nursing and Midwifery Board of Australia.

Many students are recruited through university open days, and this on-campus activity is supplemented with Google and Facebook advertising.

The Union offers webinars to students and over the course of the year, 2200 registered for these. Four hundred student members joined from these webinars, who were often in their second or third year.

Upon completion of their studies, students can apply for about 2500 New Graduate Start Program positions. It is from this cohort that many students are converted into full membership. NSWNMA examined its conversion process for improvement.

Converting student members to full membership

The NSWNMA has good relationships with universities and NSW Health, and is invited to speak at new-graduate orientations. The union has a dedicated officer to manage these orientations. However, about 35 per cent of graduates do not take part in these orientations, so other means of connecting with the union are necessary. For the NSWNMA this means establishing a connection early.

Previously, there had been no way for new members to sign up without payments starting on the same day they join, which was problematic if they don't actually start work until later.

From the first year of study through to their final year, students are given multiple entry points to join as a full union member. Through automated email journeys using Salesforce's marketing automation tools, the NSWNMA digital and communications team take student members on a number of tracks as they approach their graduation date. These become more frequent and focused in the final year.

In July-August, NSMNMA starts running education webinars and publishing advice articles on its website about how to apply for new graduate positions. These focus on topics such as how to perform well in interviews and how to prepare for transition to the workplace, which covers professional registration with the Board.

In October-November, an email campaign targets all student members with a graduation date between June and March. Student members are offered two weeks of free membership if they sign up with their payment details and future start date, with full membership to cover them from the day they start in their new positions.

The content of these emails is kept fairly light, emphasising membership benefits and offering tools to assist new graduates in their transition to the workplace. Students are congratulated if they earn a place in a new graduate program and given the opportunity to join and ensure they are covered from the first day of the new job. The email journey is supported by social advertising. The emails include a unique link to enable pre-filled fields on the membership form.

This email also reminds students of the benefits for full members, such as 20 hours of free CPD to maintain their registration, as well as professional indemnity insurance.

These emails also filter out students who did not go onto graduate positions, with options such as "still studying? Update your graduation date". One is a link to an article: "What to do if you don't get a new graduate position". That way, the NSWNMA has data on those who may not have received an employment offer and can keep this data in the system for follow-up at a later date,

Results

- In its first year, 98 students joined early as part of this email contact. Most joined in November and December and were students who didn't start until March or February. This was significant because these early joiners would otherwise be required to be recruited at orientations, by organisers.
- 15 students who updated their graduation day remained as student members.
- 33 student members who did not receive an offer were placed on a different potential member path.
- In total, NSWNMA recruited 1637 of the 2020 graduate cohort or about 65 per cent of graduates, of whom 886 (or 54 per cent) had previously been student members

Thirteen of the 98 were not in the public health system - they were in the private sector or aged care. These sectors are particularly difficult to recruit, as there is no access to new graduate orientations.

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Unions ACT - Summer Patrol

Background

Summer Patrol is an initiative from the Young Worker's Centre (YWC) which was established by Unions ACT in 2019 to:

- provide basic information about workplace rights to young workers
- understand issues they're facing at work
- connect them with their unions and encourage them to become union members.

The mission of the YWC is to educate and empower young workers in basic organising, identify and develop workplace activists and ultimately build a network of leaders and activists to lead campaigns around key issues.

This is achieved through a range of methods including the provision of a free and confidential advice service on workplace rights via an online portal, email address and phone line. This service also refers young workers to the appropriate union. The YWC also has a presence in high schools where it conducts outreach programs and other activities, and universities and TAFE where it holds stalls and leaflet events.

Campaign strategy

Summer Patrol is a mass peer-to-peer campaign getting young workers having union conversations founded in basic organising conversation training. These conversations expose key issues that will help inform the strategic direction of YWC while broadening its reach and capacity to build a young activist network. Underpinning the action is the goal of raising the profile of unions in the lives of young workers. Based on anecdotal evidence and experience, YWC believes that young workers are not anti-union; by contrast they often know they are being exploited at work. The gap for many is the connection to union. Summer Patrol aimed to bridge that gap.

Summer Patrol is as it sounds - a rapid, focused program to bring in young workers, skill them up and send them out on a blitz talking to their peers. The initial focus was on the hospitality industry and the issues of wage theft and insecure work.

The program has been adapted from one used by TLCs in the UK which had built upon a program first devised in Norway.

Steps involved

Core activists already involved in YWC recruit young workers to Summer Patrol. These workers are given a half-day training and practice persuasive union conversations. The idea is to identify issues faced by the workers and then ask them to sign a pledge to participate in a campaign to end wage theft. The pledge meant YWC then had contact details for follow-up action. After training, the activists blitzed workplaces so they could immediately put their training into practice; the action all took place in one day.

Before the action day, YWC mapped out a precinct of workplaces to target - fast food outlets, retail outlets and hospitality venues. As YWC has no right of entry, the criterion was workplaces that any

member of the public could enter. The activists divided into teams of five and held conversations in pairs. The conversation led with a four-question survey and they also distributed fliers containing basic workplace rights information. During the action 60 conversations were held across 30 workplaces. The teams dressed up in Summer Patrol t-shirts so were highly visible to workers who were present but not necessarily involved in the 1:1 conversation. Following the blitz, the teams held a debrief to assess what went well and what the key issues were that could inform future campaigns.

What worked well

One of the campaign successes was the social and collective spirit of the endeavour. YWC deliberately positioned the idea of union as fun, cool and accessible. Workers had conversations with young, friendly people who were like them and who understood their industrial context.

The conversations were designed to be casual with low stakes, just a pledge to participate in ending wage theft. The blitz approach meant young workers and activists were able to experience a sense of satisfaction and a buzz was created with "solidarity on the streets".

The short survey was a good model to find a way in. In workplaces with managers present, the activists framed their visit as a confidential survey to young workers about their experiences of work. Managers generally agreed to this request with the only objection being, "come back later, we're too busy right now". The blitz provided useful insights into key issues which could then guide campaigns.

The leaflets provided supplementary information and were a good back-up in situations where the managers were listening to conversations. This inhibited the workers' responses but at least they had take-away information that could result in follow up contact.

Summer Patrol has allowed YWC to extend its network of young workers and has further upskilled core activists. Ideally the current activists will become leaders who coordinate the next action.

The blitz drew media attention which raised the profile of Summer Patrol, although this also served to tip off the bosses. In future the timing of media exposure should be considered so that it doesn't hinder the action.

Before the day of action, YWC carried out a few smaller trials and used this experience to refine the blitz. It also hooked up over Zoom with unionists in the UK and Norway to compare strategies and fine-tune the approach.

Next Steps

YWC will explore how to continue the sense of blitzing within the context of COVID. Unfortunately, the timing of Summer Patrol coincided with the start of the pandemic and widespread lockdowns so this impacted the momentum and further actions.

In addition, YWC wants to trial different approaches including looking at P2P texting, phone banking and online actions.

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Offshore Alliance

Background

The Offshore Alliance describes a partnership that has **developed between the AWU and Maritime Union of Australia to represent workers in offshore production**. It encompasses workers in drilling, maintenance, construction and catering operations concentrated in the north-west of WA. The Alliance has 1600-1800 members.

It is a strategically important industry, with employers who are notoriously aggressive, anti-union and well-resourced.

Goals

The Alliance's goal has been to develop a strong and powerful union for the offshore oil and gas industry that is financially sustainable and recognised by workers, employers and other stakeholders. This overarching goal will be achieved through building union density and activist structures at the site and industry level; delivering union agreements with improvements to wages and conditions; and demonstrating the union's commitment to innovative onsite, remote and digital organising.

Planning

The first stage involved extensive planning and research to better understand the worker profile and to determine which employers to target. The Alliance engaged University of Sydney and Edith Cowan University to assist. This provided reliable data about employment types (contracting and casualised) and the Alliance identified and targeted the most aggressive employer in its initial campaign.

Strategy

To accomplish its goals and deliver on its 'theory of winning', the Alliance adopted an integrated legal, industrial, organising and public awareness campaign. It formed an industry worker organising committee to develop and lead across-site campaigning. It identified offshore workers who were prepared to be the public face of the campaign and developed a direct and remote engagement plan supported by innovative digital engagement.

As part of the public campaign the Alliance identified community and non-worker campaigning opportunities including outreach to supply chain, government and political allies. The messaging to the public and all stakeholders highlighted the economic importance of the offshore oil and gas industry but identified that the multinational players who dominate the industry have capitalised on the remote locations to flout environmental regulations and drive down workers' wages and conditions.

The communication strategy was integral to the Alliance gaining traction in a remote workplace. Digital tools included text messaging, Facebook groups and emails. Facebook was a successful medium as offshore workers are captive to the internet. The closed and public Facebook pages became a central point for identifying activists and for campaign bargaining.

While the communication platforms were novel, organising strategies were similar to those onshore.

Organising remotely

The Alliance has recruited and organised 1800 workers via the same strategies that succeed in the mainland environment. Using both central, single site and closed Facebook pages they mapped workplaces remotely, identified online activists, established the issues and educated and empowered members with powerful visual messaging.

Offshore workers fly to and from their places of work, The Alliance mapped workers travel arrangements and engaged with workers at airports on fly in and fly out days.

New members received a welcome email, text or call usually within 24 hours. This immediately created a sense of value for the new members. **Data analysis enabled the Alliance to determine that members were most active on Facebook around 9pm so strategic messaging was delivered during peak online traffic.**

> **Data analysis enabled the Alliance to determine that members were most active on Facebook around 9pm so strategic messaging was delivered during peak online traffic.**

Legal strategy

Given the belligerent nature of the employers in the industry, the Alliance anticipated resistance so had dedicated legal resources and a strategy in readiness. The key components of the legal strategy were to establish Right of Entry for AWU and MUA officials, oppose non-union agreements and establish enterprise bargaining. Once strategic targets for bargaining were identified (from the planning phase) the organising campaign began in earnest. From there the legal and organising strategies went hand in hand.

From the outset, the environment was combative with simple issues such as Right of Entry becoming a legal battleground. The Alliance has been compelled to enforce relevant sections of the Fair Work Act on multiple occasions. Legal instruments were also needed to bring employers to the table in bargaining arrangements. The Alliance has been and is currently involved in a number of lengthy disputes around bargaining but has been able to achieve significant gains in the face of a hostile environment and aggressive employer tactics to encourage members to vote against union agreements (for example, offering a cash bonus over the Christmas period). **Significant wins in the bargaining process include members receiving a $30,000 pay increase. In addition, the Alliance was able to win permanent contracts for 70 per cent of a site that was previously 100 per cent casualised.**

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Key lessons

The things that have been successful in the campaign to date include:

- Equal sharing of resources and rewards between the two unions.
- Development of contact lists with the capacity to target specific groups. This is essential to minimise overload when organising and developing members.
- Having regular targeted messaging and quick responses to texts, calls and Facebook posts. Being available when the members are is critical to maintaining momentum and building activism.
- Support from industrial officers, WHS specialists and administration staff to provide accurate information to keep members engaged and active.
- The critical importance of digital communications; organisers with poor digital literacy were provided with support and training.
- Regular leadership interest and engagement in campaigns and planning.

The things that do not work so well include:

- The Alliance that was developed in 2005 based on demarcation roles.
- Poor communications and messaging resulted in campaign delays.
- The in-Facebook town hall meetings were inconsistent.
- It was also noted that online activists don't necessarily translate to on-ground activists.

Next steps

1. Consolidating and increasing industry power through strategic campaigns.
2. Building industry-wide structures.
3. Building sustainable workplace structures.

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