



BRANCH RETENTION STRATEGY:

ORGANISING AN EFFECTIVE BRANCH RETENTION STRATEGY

A guide by:


UNISON
North West





INTRODUCTION



Record numbers of joiners in the latter half of 2022 overshadowed leavers which have increased persistently since 2020. Net growth was achieved in 2022. However, in Feb / March 2023 joiner levels remain high, but below record levels.

Leavers meanwhile continue to increase, exceeding joiners, and resulting in decline. The challenge is serious but not insurmountable. At the time of writing, if we had retained just 1 in 24 leavers (1st April 23), UNISON would remain in sustainable growth.

The Organising, Recruitment and Strategy Development project has run several recent retention pilots and work is ongoing nationally with the Member Engagement Programme, Communications, RMS, and Data Insight along with external support to better understand why members leave and develop a comprehensive retention strategy with the necessary insight and tools to deliver it. However, urgent action can be taken now within existing systems to reduce the level of leavers and return the union to growth.



3 STAGES OF RETENTION JOURNEY

1. Join and Welcome

A. DOCAS Join Online (DJOL)

We know that DOCAS members tend to remain in membership for longer than Direct Debit. Around 95% of joiners now join online. It is therefore vital that branches with the support of Regional Organisers urgently reach DOCAS Online agreements with all major recognised employers to ensure that new joiners pay via DOCAS wherever possible. Report "CDASO29 DOCAS Employers by Region" shows all DOCAS employers

Regions should be working in partnership with branches to ensure that Service Level agreements are reviewed and monitored and that

existing agreements are reflective of employers within the branch and to update changes with any outsourcing of payroll providers. Monitoring change will reflect our membership records, to enable members to stay in membership when there is a change of payroll provider.

Branches can contact the Region for a copy of current Service level agreements and any new agreements need to be forwarded to the regional BERT team. Model Templates for agreements are available from the region. A branch guide for Service Level agreements is available.

See Supporting documents.

B. MCT Welcome calls

It has been demonstrated that a welcome call from the branch or region in the first few weeks of membership increases the numbers of members who remain in membership beyond a 12-14 week period.

Wherever possible, branch WARMS users are making the MCT calls, with regional staff covering the remainder. Some regions announce each month's campaign and remind branches of the need to make the calls at the start of the month,

This gives branches two weeks before regional staff then clear the remainder in the second half of the month. Branch and staff MCT activity can be monitored, and non-engagement followed up.

Branches can request access to MCT light if there is full user allocation on WARMS. This will encourage more participation within the branch to assist with calls.

MCT support, including short instructional videos, can be provided by "Operations, RMS"
[<R.Operations@unison.co.uk>](mailto:R.Operations@unison.co.uk)

2. Member Experience

A. A Well Organised Workplace

Members will remain in membership when they experience the good work and benefits of the union. A well organised workplace with skilled and experienced stewards, effective communications, visible workplace activity, and high-profile wins will all ensure members remain for longer.

Organising Framework action plans should be revisited by the branch and RO regularly to build, train and support the activists base and deliver workplace activity around widely and deeply felt issues for members.



B. Branch Communication Strategies

Branches must be supported to ensure they are sufficiently visible to all members in recognised and unrecognised workplaces and to peripatetic and home workers. In addition to traditional noticeboards, WARMS/ bulk email / social media and branch websites should be used to reach every member to showcase activity, celebrate wins, promote membership benefits, and provide opportunities for participation through member meetings and “asks” that contribute to campaign goals.

UNISON North West have set up branch comms templates that can be used by branches to share updates and wins to members. Branches can request comms training to enable branches to use comms via all platforms online and offline.

See Supporting documents.

UNISON North West
IN IT TO WIN IT
February 2023 Edition

Insourcing Win at Liverpool Hospitals

After much hard work and campaigning from UNISON Liverpool Hospitals Health Branch, around 670 staff at Liverpool University Hospitals NHS Foundation Trust will be brought back in-house. Staff, who work as cleaners, porters, caterers and in other domestic services will be transferred onto NHS terms and conditions once the outsourced contracts come to an end in March this year.

UNISON NW HAS WELCOMED:
4,151
new members so far this year

Care Workers Win Pay Rise

Care workers employed by Aspire Care and Support in Salford have achieved a £1925 pay rise, backdated to April 2022. They have now secured the same pay rise as their council-employed colleagues. UNISON members working for Aspire organised and campaigned for months to achieve this well-deserved pay rise.

AND MORE!

- Outsourced OCS hospital workers in Lancashire have won equal unsocial hours rates to their NHS colleagues, following on from their successful strike and pay rise in 2022.
- Environment Agency members held their second strike on 8th February for fair pay, after receiving a derisory 2% pay offer.

THIS MONTH UNISON NORTH WEST HAVE TRAINED 12 NEW REPS

C. An accountable Branch Committee

Branch joiner and leaver reports are emailed to WARMS users weekly available via WARMS, and must be shared and discussed at every meeting of the branch committee to track trends and agree appropriate organising interventions.

How to Guides are available for branches to assist in using WARMS for contacting Joiners and revisiting Service Level Agreements Please see supporting documents page.

3. Leave and Lapse

Members who cease DD payments appear on DD cessation reports. Members who cease DOCAS payments appear on DOCAS cleanse reports. GDPR compliant contact can be made with these potential leavers prior to membership lapse.

Providing contact details are accurate on WARMS, all members who cease payment already receive a series of emails or letters from UNISON centre advising that their membership is due to lapse and signposting to reasons and ways to remain in membership. All these national materials are currently under review. **Branch and Regional intervention must provide an additional and deeper response and not simply duplicate existing automated UNISON centre correspondence.**

In recent potential leaver pilots, DOCAS leavers gave a more favourable response to 1-1 contact and were more likely to be open to remaining in membership. Whereas DD leavers tended to have made a conscious cancellation via their bank or have insufficient funds for payment, a proportion of potential DOCAS lapses are unintentional due to payroll error, workplace reorganisation, TUPE, long term absence, retire and return, change of job role, or change of employer.

DOCAS cleanse reports and action plans

- The appropriate branch officer or WARMS user must be identified with RMS code 105 to receive the DOCAS cleanse reports for their Branch. Regional Organisers will also receive DOCAS reports for the branches they are assigned.

- In recognition of the current retention challenge, it is now encouraged branches make contact with potential lapsers.

In one recent Branch DOCAS cleanse report, 27% of potential leavers were unintentional. Engagement with branch and 1-1 contact with potential leavers ensured these members were retained. Expediency is essential and the one-week deadline should be adhered to wherever possible. Short extensions can be requested of IMPS if required to complete follow up. Extensions may be refused during ballot periods when cleansing is urgently required.

Branches need to discuss extensions with the RO before submissions.

When a DOCAS cleanse report lands, Branches will receive contact from the region to confirm the report will be actioned as outlined below. Where region cannot be confident of activity, additional regional support and resource must be provided to ensure DOCAS cleanse report scrutiny and intervention.

Action Plan

<p>Branches & region must:</p> <ol style="list-style-type: none"> 1) Be satisfied that every leaver is intentional. 2) Intervene to retain unintentional leavers. 3) Seek to persuade and retain intentional leavers. <p>The above may be achieved via workplace activists where possible but otherwise via direct 1-1 phone or workplace contact by branch and / or region</p>	
<p>No pay due to maternity or long-term sickness absence</p>	<p>Mark cleanse report DNL (Do not lapse) AND update WARMS sub-category</p>
<p>Payroll error identified. Member remains at same employer and wishes to remain in membership.</p>	<p>Mark cleanse report DNL. Contact payroll to re-establish subs. Arrange completed new payroll deduction mandate from member if required by payroll dept. Check future report to ensure subs have been re-established</p>
<p>Member left employer but wishes to rejoin</p>	<p>Do not mark report. Recruit member with new form either face to face or via easyjoiner. Member will be lapsed and so will need to be reinstated once the new mandate is received. If they join online, their new record will be linked to their previous record for continuous service. These members will also receive auto generated IMPS letter re member benefits and rejoining (content currently under review)</p>
<p>Member has retired and returned and wishes to re-start membership</p>	
<p>Member has retired and wishes to join as retired member</p>	
<p>Member remains with employer but is an intentional leaver</p>	<p>Attempt to retain or rejoin using persuasive 1-1 conversation. If successful rejoin member and mark cleanse report DNL. If unsuccessful do not mark report. Member will also receive auto generated IMPS letter re member benefits and rejoining.</p>
<p>Member has retired and returned but does not wish to rejoin</p>	
<p>Member moved employer</p>	<p>Attempt to retain or rejoin using persuasive 1-1 conversation. If successful rejoin member. Do not mark report (irrespective of whether they rejoin or not). Member will be lapsed and so will need to be reinstated once a new mandate is received. If they join online, their new record will be linked to their previous record for continuous service. Member will also receive auto generated IMPS letter re member benefits and rejoining.</p>

Leave and Lapse continued

Ceased/ Suspended DD reports

Branches can access WARMS reports of members with ceased or suspended Direct Debits. These members are potential leavers who will lapse 12 weeks after ceased payment unless they reinstate their DD or start DOCAS payments.

Direct Debit suspensions are due to insufficient funds. Branches may wish to follow up these members with information regarding There for You (UNISON Welfare) and pay campaign information.

Direct Debit cessations follow the member contacting the bank to cancel payment. They are not generally due to error. However, with real time cessation information on the WARMS and weekly joiner / leaver reports, there is a 12-week window to contact these members to attempt retention. The member can re-instate DD payments via UNISON Direct or via My UNISON. In recent pilots, some DD payers did welcome contact and the option to change their DD payment date (via My UNISON or UNISON Direct) or re-join via DOCAS (where available).

Leaver Reports

Weekly leaver reports (emailed centrally to all Branch WARMS users) show levels of leavers – ie those who have reached the end of the 12-week period and whose membership has been lapsed - by branch and employer. Every leaver will have previously appeared as a potential leaver on a DOCAS cleanse or DD cessation / suspension report and should have been contacted at that point. Leaver reports must be scrutinised by each Branch to identify any concentrations of leavers that could be due to payroll error, TUPE transfer, or deterioration of local union organisation etc.

The image shows two screenshots of the UNISON WARMS 'New Campaign Contact' form. The top screenshot shows a dropdown menu for 'Contact Outcome' with a list of options including 'Personal Contact Made (to be followed up)', 'Call back requested (to be followed up)', 'Failed - no answer (to be followed up)', 'No answer - no further contact needed (drop from campaign)', 'Historical Personal Contact Made (drop from campaign)', 'Historical Phone Contact Made (drop from campaign)', 'Invalid phone number (drop from campaign)', 'Member does not wish to be contacted (drop from campaign)', 'No Phone Number on record (drop from campaign)', 'No contact required (drop from campaign)', 'Unsuccessful member (drop from campaign)', 'Personal Contact Made (drop from campaign)', 'Personal Contact Made (to be followed up)', 'Successful phone contact made (drop from the campaign)', 'Successful phone contact made (to be followed up)', 'Voice message left, further contact needed (to be followed up)', and 'Voice message left, no further contact needed (drop from campaign)'. The bottom screenshot shows the same form with the 'Contact Outcome' dropdown set to 'Please select' and a list of options including 'Ballot paper has been received - confirmed if has been returned', 'Ballot paper has been received - stands to return if', 'Ballot paper has been received refused to voter/ do not wish to vote', 'Contact made, member aware of ballot and waiting for paper to arrive', 'Duplicate ballot paper requested - Change of address', and 'Left voicemail for member asking them to vote'.

Leave and Lapse continued

Organising Interventions

Where short term concentrations or longer-term patterns of high levers are identified through the reports, further exploration and organising intervention will be required which may include a program of workplace visits, a plan to rebuild a local activist base, improved branch communications and profile, or support in campaigning around a local issue.

Identifying workplace contacts and activists to help with branch profile is key to retention of members. Having a visible presence within the workplaces engaging with members show positive outcomes within retention figures. All activists have an active role to support the branch with retention.



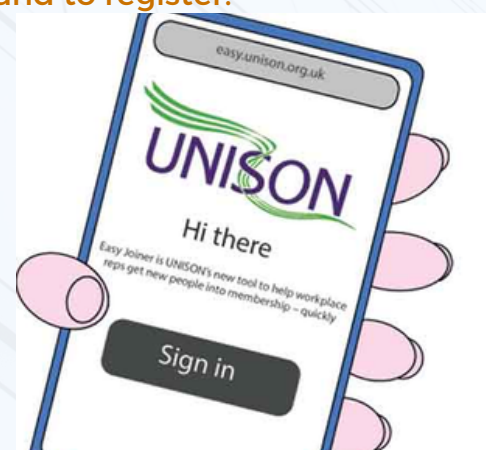
Reinstating payments/ Easyjoiner

Payments can be reinstated by the member by updating the My Details section in My Unison or by phoning UNISON direct. To re-instate or move to DOCAS, the member should complete a new membership form with payroll deduction.

When seeking to reinstate a member via a new membership application, the activist should be expected to use the UNISON Easyjoiner system. As opposed to the join unison weblink, the Easy Joiner system allows any staff, activist, or member to quickly email a part populated membership form to anyone with an email address, and then track whether the form was subsequently completed and returned, enabling follow up where it has not been actioned. For information and to register:

<https://easy.unison.org.uk/welcome>

If you have any questions about Easyjoiner
email : emails@unison.org.uk



Branch Priority Action Checklist



Branches can use the Priority Action Checklist to assist with the 3 Stages of Retention Journey as a guide.

- Complete DOCAS Join Online Process prioritising DOCAS employers of 100+ members
Check and Review SLA agreements with support of Regional Organiser. (See SLA Good Practice Guide - Supporting documents)
- Regular review of Organising Framework Action Plans to ensure adequacy for the retention challenge including workplace presence, member participation, expansion of activism and a communication strategy that reaches all members.
Communication templates are available for Branches to use, visit <https://northwest.unison.org.uk/comms-hub/> to find them.
- MCT welcome calls by Branch and / or Region to clear each month's campaign, starting with "priority" campaign
This can be completed via WARMS and MCT light users without Warms Access. (See Supporting documents)
- Branch joiner and leaver reports scrutinised at every Branch Committee
Branches to ensure the reports is listed as standard item on Agenda, ensuring GDPR compliance is met when sharing members data.
- DOCAS cleanse reports received by correct Branch WARMS users / Officer, and Regional Organiser – ensuring RMS records are updated and maintained.
Branches to set clear timescales for actions to be done to support cleansing of reports

Branch Priority Action Checklist Continued



- DOCAS cleanse reports urgently actioned by Branch including discussions with relevant workplace activists and 1-1 contact with member. Identify any unintentional leavers and persuade others to remain in membership Update DOCAS cleanse report and return to IMPS within given timescale, requesting brief extension if needed.
Branches to discuss with Regional Organiser for requesting extensions to IMPS.
- Although priority should be given to DOCAS cleanse reports, DD cessation reports must also be scrutinised and followed up by Branch and / or Region where there is a chance to persuade leavers to remain in membership (eg move to DOCAS, change DD day, UNISON Welfare support, campaign and resolve workplace issue etc.).
Branches to ensure 1-1 contact is made and using communications via all methods to promote the benefits of UNISON can assist leavers remaining in membership.
- Leaver reports scrutinised by Branch and Region to identify any concentrations or patterns and determine causes with appropriate urgent intervention and ongoing monitoring.
Branches to share trends with Regional Organiser to enable urgent interventions and provide support. Branches may identify workplaces for collective bargaining purposes.

SUPPORTING DOCUMENTS

Branches needing additional support can contact their Regional Organiser and branch Guides are available to support and assist branches with the tools available.

Documents can be downloaded via the link below:

northwest.unison.org.uk/retention-guide-resources

This page currently includes:

- **The Branch Guide to Service Level Agreements**
- **How to use WARMS to log Campaign Contacts**
- **MCT Light User Guide**
- **Activist Comms Hub**

**APPENDICES CAN BE DOWNLOADED AS
WORD DOCUMENTS BY SCANNING THIS
QR CODE**

