

GIVING MEMBERS VOICE

A TYPOLOGY OF MEMBER ENGAGEMENTS

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Unions 21

Unions 21 is a forum for unions to explore our shared challenges. As unions, we work collaboratively to develop practical projects and ideas which build tomorrow's unions.

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Introduction

At their very core, trade unions are member organisations.

This leads to the question, what are the ways in which members are engaged with their union?

This paper from Damon Silvers helps unions to explore the ways in which members are engaged. It sets out different types of engagement and it aims to help unions develop their strategy for engaging with members and what aims they seek to achieve.

At a time when unions are in the spotlight more than they have been for years, it is a timely discussion about how unions communicate, how they find out what members think and how members can shape the work of the union.

Member engagement

The foundation of trade unions - what they begin with and where their life blood comes from, is conversations between and among working people that begin with the recognition of common experiences and interests. These conversations lead to commitments to common strategy and action to build power and use it to improve our lives as working people – in the workplace, in our communities, and in the life of our nation.

The trade union movement around the world is now more than 200 years old, and these conversations among working people have been constantly evolving, and the organisational forms of trade unions have evolved with them. The clandestine trade unions of the early nineteenth century, the skilled craft unions of the 1860's, the London dock workers' organisations of the late nineteenth century, the industrial unions of the mid-twentieth century or the public sector unions of today are different organisations founded on very diverse conversations and needs.

The rapidly changing economic, social and above all technological environment of the first two decades of the 21st century has led to dramatic changes in the possibilities for unions, making older forms of organising more difficult in some circumstances, and creating opportunities for new forms and ways of conversing that were unimaginable to workers in previous generations.

From data gathering, to surveying, to conversations with members, through to the Holy Grail of trade union communications of members talking to each other, this is not a typology about how to tell members things, it is about different ways of listening to members and then reflecting that back to them in how the union operates and prioritises its works.

As such, it echoes the call made in the recent Unions 21 report on data that strategy must always come before tactics; that *why* comes before how.

By the end of this paper, we hope that unions will be able to make smart decisions when they communicate and also when approached by consultants and companies that market software packages and services. It breaks down union communications strategy into four types, in order of increasing depth of member engagement:

- Data Gathering
- Surveying
- Conversations between union leaders or organisers and union members
- Conversations among union members

It looks closely at the communications challenges for trade unions in the era of social media, big data, and remote work, and then goes into detail about the types of union communications, the issues that come with them, and their implications for the type of trade union movement we seek to build.

The challenge of trade union communications in the post-COVID era

Trade unions came into being in a world where people who worked together did so in the same physical space such as in a workshop, a factory, a farm field, a ship. Workers who worked together usually lived near each other, participated in the same community structures, went to the same pubs, the same churches, and their children went to the same schools. Conversations among workers about work were relatively easy, in fact those conversations were in many ways at the natural centre of workers' lives.

Urban industrial society came into being as a chaotic social space, where many observers spoke of peoples' isolation from each other in the new society. In response working people created through conversation the social bonds that underlay trade unionism but that also gave our lives richness and meaning.

But for decades the social structures of twentieth century industrial society that helped to foster the growth and strength of trade unions have been in decline as economies shifted from the production of goods to services, and people's ties to organisations like pubs, social clubs and churches weakened. These trends have been noticeable since the 1970's, and have been addressed by scholars in different national contexts, perhaps most famously in the U.S. context in Harvard professor Robert Putnam's *Bowling Alone*.

Post-COVID these long term trends have been supercharged by the combination of technologies such as free, reliable video conferencing, workers' fears of disease and the desire to escape long commutes and to be at home with their families rather than in workplaces. All of these factors allow the radical dispersion of many kinds of work. Therefore, while huge numbers of jobs continue to be done in centralised workplaces, the number of people working from home and in a variety of other kinds of isolated settings such as delivery vans, platform based work has increased, and it seems unlikely it will ever return to pre-COVID levels.

Like wartime, COVID has been the catalyst for workers and employers realising the true implications of technologies that existed before. Work remains collaborative, and yet many of us work alone or in fragmented workplaces. And this is a serious challenge for unions whose daily life as organisations has been built on face to face communications in the workplace.

The promise and challenge of new communications technologies

The digital age, and particularly the age of high speed internet and smartphones that began around 2010, has created a fast shifting landscape of communication. Compare the change from the dial telephone, which everyone used, to mobile phone with the rapid changing communications platforms of today which require segmentation (particularly by age).

Email, Facetime, Facebook, LinkedIn, Whatsapp, Twitter, Snapchat, Tiktok – each have a different customer base, each are used for different types of communication and have different implications as platforms for workplace conversation and organising in particular the broadcast versus the conversation. Social media is where many of our members converse, where they build community, and potentially, where they organize and engage in collective action, both in the workplace and in the larger political and social landscape.

In a recent report, **Using Data to Build Strong Unions**, Unions 21 laid out the basic building blocks of how unions can make the best use of data, together with case studies of best practices by UK unions. Having a good understanding of data is essential to think strategically about member communications. One particularly strikingly advanced version of this capacity highlighted in the report is the National Education Union's comprehensive data strategy:

"I had a look at the survey you're doing yesterday and I'm thinking I don't use data. Now just listening to what colleagues have said, I'm thinking, actually, yeah, we do."

What the NEU's work (along with all the other examples in the report) shows is that ultimately 'member communications' is more than communications. Properly understood, it is what trade unions are. It is about relationships. And so the choices trade unions make about how to communicate with their members, and how to facilitate their members communicating with each other, are in reality decisions that shape trade unions' strategies across all of their activities – organising, bargaining, political and social action, and internal governance. And so in thinking about communications strategy, trade unions, their leaders and members should think about connecting communications strategies to broader goals – what do we want to achieve as a union? And what do we want to *be* as a trade union?

How to make sense of strategic communications choices

WHAT IS YOUR GOAL?

Trade unions may arise out of conversations, but they are organisations – with leaders and governance, and institutional purposes. When trade unions initiate a communications programme, they generally do so with specific purposes. In labour relations systems like the United Kingdom, or in the U.S. public sector or in so-called ‘right to work’ states, where individual workers make individual decisions to join unions and pay dues, member communications programmes are likely to have persuading members to continue to be members, and to persuade non-members to become members, as one of their purposes.

But communications programmes are rarely just about recruitment. Trade unions communicate with union members usually about issues in the workplace – seeking member input into determining the goals of contract negotiations, educating members about how to exercise their

rights at work through industrial tribunals, and seeking to encourage member participation in union activities ranging from picket lines to social activities. And trade unions often want to communicate with members about politics.

No matter the purpose though, trade union member communication, like any conversation, tends to involve a mix of telling and listening – of pushing out information and asks, and of soliciting opinions and views as to the union’s direction. But in the age of algorithms, big data, anonymous phone banks and social media campaigns, it can be hard to sort out exactly what the distinguishing features of a member communications programme are. The remainder of this report is an effort to identify a range of possible approaches to member engagement, to help trade unionists cut through the often impenetrable communications jargon that surrounds much of trade unions’ work and understand just what the distinguishing features of member communications programmes are.

Engagement typology

The typology is ordered by increasing depth of member engagement. An important thing to note is that each method is a way for trade unions as organisations with professional staff and elected leaders to receive information from union members. This is not a typology about how to tell members things, it is about different ways of listening to members.

1. MINING VIEWS: DATA GATHERING

Data gathering can be summed up in one key word, mine. And the phrase associated with it is “what do they want?” Note the phrase is grammatically a conversation among union leaders or staff in which the members themselves are off stage and not party to the conversation in any way at all.

Until very recently, it was not really possible for trade unions to learn very much about what their members were thinking without in some form actually communicating with members – through organisers or shop stewards or conducting a poll or phone banking. But the rise of data mining social media has completely changed what is possible in this space, making it possible for trade unions to learn a great deal about union members without ever actually interacting with a member. There are two basic forms of data gathering – explicit and implicit.

Explicit data gathering involves scraping members’ social media accounts for information directly related to their views of the workplace or larger political and social questions. For trade unions this type of communication – passive, almost unknowing, but potentially quite comprehensive gathering of information about members’ views, is in its infancy. But it is potentially a powerful tool for a trade union to understand the general views of its membership on important issues a trade union

may be considering action on. But data gathering of this kind raises important issues about how a trade union wants to relate to its members – issues of data privacy, consent and issues of third party unionism.

This type of activity inevitably creates a relationship of distance and secrecy between a union and its members unless very consciously managed to avoid these dynamics – i.e. only tracking social media accounts of members who have specifically authorised the union to do so and expect their union to do so. Ironically, this type of arrangement verges on fostering a continuous conversation among members and their union officials as those members that have authorised their union to monitor their social media will then almost certainly use those same social media accounts to consciously communicate directly with their union.

Implicit data gathering involves activity that is generally known as data mining for the purposes of inferring member attitudes toward organising, bargaining and politics. This type of activity is particularly common in the U.S. as a key technological tool in politics, largely for the purpose of trying to figure out which voters might be open to being persuaded to support a particular political candidate. Unions could also use this type of publically available data to determine which workers might be more open to supporting a union organising drive, and thus help to focus limited organising resources - phone bankers or door to door canvassers - in organising campaign.

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This method would involve trade unions accessing a range of commercially available databases on the general population, which includes information on trade union members. When used in an integrated fashion, this type of data (for example, street address, car ownership, extent of education, history of voting (not actual voting preference), magazine subscriptions) can be the basis for creating a profile that has significant, if not foolproof, predictive power. Again implicit data gathering does not involve any direct contact with members, nor any effort to find out what members directly think. Rather it would involve using publicly available data to infer what trade union members are likely to think.

Like explicit data gathering, implicit data gathering can be inherently distancing as a method trying to learn what union members think, compared, for example, to a phone conversation or a doorstep visit. However, in the hands of skilled IT professionals and statisticians, it is extremely economical compared to actual conversations – hundreds of thousands or millions of workers' attitudes toward organising, bargaining or politics could be measured for a fraction of the cost of a professional canvas or phone bank operations.

Unions using publicly available information to help understand their members' attitudes raises two kinds of issues. The first is that data privacy laws vary significantly from country to country. For example, those laws are considerably stricter in the United Kingdom than in the United States. Data may be publically available in some fashion and still it may not be legal to use it. It is critical for unions to be well advised by lawyers when thinking about this kind of activity.

Even more important is understanding how choices we make around techniques like data mining shape what kind of organisations we become. Unions should think about how to make use of modern

data tools in ways that build transparency, and accountability to members. Union leaders and staff do not have to just accept data tools as they are designed for commercial purposes or political purposes. Union leaders and staff should constantly be asking, how can we use technology to make it interactive, to deepen and broaden conversations with our members – to move away from activities that treat the membership as “they” and toward activities that build the union as “us.”

2. ASKING: SURVEYING

The key word that sums up surveys is ask. The key phrase is “what do you want us to do?” Note that we have now moved the members from the “they” of data gathering to the “you” of surveys. The members are now active participants in the conversation, but the trade union is still separate from the members in the structure of the question, and the conversation is about measurement, not about change.

Surveying is what it sounds like – the trade union asking structured questions of its membership. A survey can be comprehensive – a set of questions sent to all members as part of an effort to define a trade union's bargaining, policy or political agenda. Or it can be in the form of a poll sent to a random sample using statistical methods to ensure the sample is representative.

Unlike data gathering, surveying involves actual interaction with members, but entirely on the trade union's terms as an institution. The questions are structured by the union, and the whole point of the interaction is that it is not open-ended or spontaneous, and does not involve interaction between members. Individual members respond to pollsters or fill out surveys. No interaction between members but input is gained from a wide range of members.

Surveying by its very nature is highly vulnerable to the trade union setting it up to get the answers that trade union leadership or staff want to hear. Polls are notoriously sensitive to the way polling questions are phrased. Polls and surveys are in a sense participatory. Members express their

thoughts to the trade union as an institution. However, the participation is stylised and the members reflect back to the trade union a reaction to the issues the trade union chooses to ask them about.

Statistically sophisticated surveying is not only a valuable way to understand the views of members, but it can also be an extraordinarily effective way of communicating views to key audiences like the press, employers and politicians. Polls can express nuances persuasively, such as cross-party support for particular policies. A recent example of this was Prospect's **April 2021 poll** showing 66% support among workers who work from home for a "Right to Disconnect" from the digital workplace, following legislative action on this issue in Canada, Ireland and the EU. The key finding was that a majority of Conservative voting workers supported such a right. An even more striking recent use of polling, thought of the general public, and not union members, was the **June 2022 RMT poll** showing broad public support for RMT negotiating objectives during a period of intermittent strike action. The CWU did a **similar poll this summer** showing broad public support for job action by postal workers.

At the same time, surveying can play a critical role in helping large national unions understand how its members understand challenging and new bargaining issues, and can be a powerful tool for demonstrating to employers and the public that the union's bargaining positions reflect the membership's desires. A very important example of this use of surveying in the age of COVID was the **FDA's member survey** in January 2021, a critical moment in the COVID pandemic. At a time when there were pressures for what would clearly have been a premature return to work, the FDA survey showed overwhelming support from senior public service workers for continued remote work.

Ironically, whole membership surveys are relatively cheap, particularly if a union has email addresses for its members. Professionally conducted polls based on statistical samplings on the other hand are quite expensive. Most polling firms now have cheaper web based instruments, which raise their own sampling issues. Focus groups may seem like they are more of a conversation, but because of the artificial way the focus group is constructed

and managed, and the reality that it has no organic life as a group or a conversation beyond the structured conversation for which the focus group was brought together, focus groups are best understood as a type of survey that benefits from some aspects of a conversation.

Surveying as a technique of member communication has become at least in the zone of trade union political communication completely intertwined with issues of messaging – in other words polls are used to test particular phrases for use in political ads or leaflets or speeches. The net effect is to create a conversation of the form "*what should we say to you that you will like and believe?*"

3. CONVERSATIONS BETWEEN TRADE UNION REPRESENTATIVES AND MEMBERS

The key word in the conversation approach to communication is converse, and the key phrase is typically "*we need you to do X.*" Note that there is still a differentiation between the trade union as an organisation (the "we") and the member as an individual distinct from the organisation ("you"). But the structure of the interaction is much more intimate and interactive than in a survey.

Conversations are what they sound like – actual interactions between people representing the trade union – elected leaders, staff or volunteers – and members. This type of structured conversation can happen in any number of settings – by email or text or zoom or on a social media platform, at the member's home, or perhaps most effectively, in the workplace. Conversations are often considered the gold standard of union member communication. And unlike the survey, trade union conversations are usually about the trade union trying to persuade the member *do something*.

Historically, trade union organising depended on this type of conversation in the workplace. Individual house calls became a key tool in U.S. union workplace organising campaigns as part of the blitz model developed in the 1970's and 1980's by the Amalgamated Clothing and Textile Workers

and later popularised during the 1990's by the AFL-CIO across the movement. From this model, entire new organisations were built like the AFL-CIO's affiliate Working America, which organises non-union workers into the labour movement through a community based, rather than a workplace based, structure.

In the U.S. labour movement, U.S. public sector unions used a conversational approach to respond to the U.S. Supreme Court's Janus decision in 2018 that took away mandatory payments to unions by public sector workers who were represented in collective bargaining. Led by the American Federation of State County and Municipal Employees, each of the major public sector unions in the U.S. embarked on programmes of having individual conversations with all of their members, seeking their members' assessment of their union and trying to persuade their members to remain in the union even now that they had the choice to avoid dues entirely. Much to the surprise of everyone, from the right wingers who organised the Janus decision to the unions themselves, this effort resulted in the U.S. public sector unions suffering almost no net revenue loss following making all payments by bargaining unit members completely optional.

A conversation differs from a survey in that the interaction is less structured, giving the union member more room to just talk about what is on their mind. Often the conversation script that the trade union representative works from begins with a very open ended question – “what issues do you care about in this election?” or “What has been happening at work?” or “how do you feel about your union?”

But typically trade unions use the conversation approach when the goal of the communication strategy is not just to learn what members think, but some combination of persuading members to think something new and persuading members to act – to join the union, to vote for a union endorsed candidate, to support a strike ballot or to vote for a negotiated contract.

In the social media context, communications that have the structure of the trade union posting material or sending out emails, with a

way for members to respond back to the trade union have the form of conversations. Social media creates opportunities for conversations between the trade union and its members that can, if the union so chooses, be transformed by the members themselves into conversations between the members, as members engage with each other as they respond to the initial trade union communication. But this generally only happens when the trade union designs the initial conversation in a way that members can see each other's responses and respond to each other. And that of course is a political choice, and it is not without potential risks and costs.

And yet the we-you structure of the conversation approach is a clue to its ultimate limitations as a way of building solidarity in the context of democratic trade unions.

Which brings us to the Holy Grail of trade union communications – members talking to each other.

4. DELIBERATE: MEMBER TO MEMBER CONVERSATION

For conversations between union members the key word is deliberate or organise. And the key phrase is “*what should we do?*” Note of course that the distinction between “we” and “you” is gone.

And so we return to the genesis of how unions started. Conversations which lead to action. The fundamental way unions function involves conversations among and between members. Workplace conversations with shop stewards, branch meetings and conventions all involve union members talking to each other. Conversations among union members do not mean the trade union's leadership and organisation capacity is absent. Rather it involves crafting communications strategy that encourages conversations that may begin with the leadership but then move to members speaking to each other about the issues involved – what to ask for in contract negotiations, whether to accept management's proposals, whether to strike, what political party or political candidates to endorse, what policy issues to fight for.

Strong, democratic trade unionism at its essence depends on a rich conversational environment between members, an environment that gives rise to a sense of “we.” A sense among the members that their trade union is what we decide to do.

Trade unions can foster conversations between members in any number of settings. The easiest ones are the ones that were originally built for that purpose such as branch meetings and conferences/conventions. For an illustrative example, **ASLEF’s website** gives a detailed picture of its 2022 convention where union activists interacted with each other to shape the union’s policy on a wide range of issues.

But, the most effective member to member conversations are those in the workplace itself, to the extent that independent space and time can be carved out from the employer. It is in the workplace that the broadest range of members can be brought into the conversation, and where union members have the most tangible feel for the urgency of the issues and the common fate that brings union members together to form their union in the first place.

In the 21st century conversations between and among members cannot be limited to the physical workplace. The most profound member communication challenge facing 21st century unions is to learn to use the new communications tools of the digital platform age to foster unifying conversations among members. This means avoiding those tools becoming top down instruments for relatively sterile interactions, or becoming captive to marginal voices who end up silencing the majority of union members in union social media forums.

In an age of severe political divisions and insurgent right wing populism it can be challenging to foster real conversations among trade union members. Many union leaders may prefer to not put out for open debate difficult issues. But in recent years trade unions’ have experienced over and over again that without having hard conversations among members the voices of hate and division grow stronger in the silence and in the dark.

Taking the next steps...

Member communication is what makes a trade union a trade union. The leaders of today's trade unions are living, as all of us are, in a world where the mechanisms of communication are changing more rapidly than they ever have in human history. But the underlying purposes – building solidarity by sharing our experiences and identifying our common interests as workers, engaging in democratic decision making to act to improve our lives – are as old as the Bible.

Our purpose in analysing no technologies, but the relationships involved in how trade unions engage with their members is not to say that there is a right or a wrong way, but rather to illuminate the choices involved and the implications of different ways of trying to learn from our members and encouraging members to learn from each other.

With member communication, like all forms of union activity, trade union leadership has to ask *“what am I hoping to achieve and in what way will we get the best response?”* There will be moments when you want to mine for information as a guide, other times to converse.

It is always important to focus on who your members and who your audience is and then pick the right approach. Constantly asking will work for one audience, not necessarily for others. And of course keep in mind that the information and data that you will acquire during engagement has a purpose, use it wisely

Ultimately how trade unions communicate with their membership, and how they encourage their membership to communicate with each other, determines what kind of organisation they are. It determines how democratic they are, how well-knit together, their ability to act under pressure, to respond to economic and social changes and to serve their critical mission for their members and for the larger society of helping the people who do the work of our society make their voices heard.

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