



BRANCH RETENTION STRATEGY: **ORGANISING TO WIN**

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.

THREE STAGES OF RETENTION JOURNEY

STAGE ONE: JOIN AND WELCOME

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 regional support, urgently reach DOCAS Online agreements with all major recognised employers to ensure that new joiners pay via DOCAS wherever possible.

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.

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/MERLIN users are making the MCT calls, with regional staff covering the remainder.

Branch and staff MCT activity can be monitored, and non-engagement followed up.

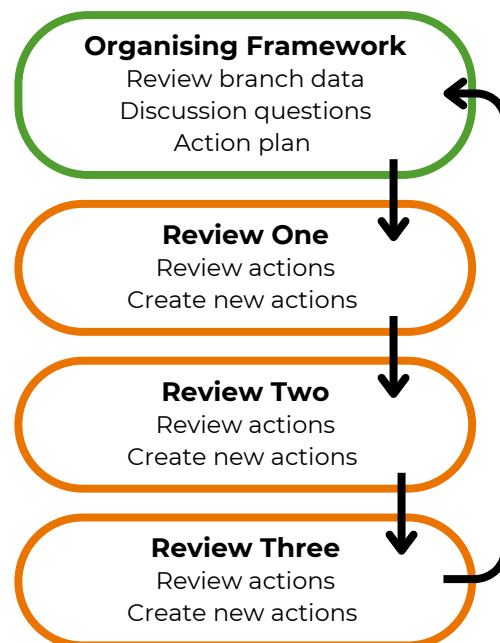
THREE STAGES OF RETENTION JOURNEY

STAGE TWO: MEMBER EXPERIENCE

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.



Branch Communication

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 celebrate wins, promote membership benefits, and provide opportunities for participation through member meetings and “asks” that contribute to campaign goals.

UNISON has set up comms templates that have been shared across regions which 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.

An Accountable Branch Committee

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

THREE STAGES OF RETENTION JOURNEY

STAGE THREE: LEAVE AND LAPSE

Members who cease Direct Debit (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.

If 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.

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 has been identified with RMS code 105 to receive the DOCAS cleanse reports for their branch.

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.

STAGE THREE: ACTION PLAN

When a DOCAS cleanse report lands, The main objectives are to:

1. Be satisfied that every leaver is intentional
2. Intervene to retain unintentional leavers
3. Seek to persuade and retain intentional leavers

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>No pay due to maternity or long-term sickness absence</p>	<ul style="list-style-type: none"> • Mark cleanse report DNL (Do Not Lapse) AND update WARMS sub-category
<p>Payroll error identified. Member remains at the same employer and wishes to remain in membership</p>	<ul style="list-style-type: none"> • Mark cleanse report DNL • Contact payroll to re-establish subs • Arrange completed new payroll deduction mandate from member if required by payroll department • Check future report to ensure subs have been re-established
<p>Member left employer but wishes to rejoin</p>	<ul style="list-style-type: none"> • 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
<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>	<ul style="list-style-type: none"> • 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>Member has retired and returned but does not wish to rejoin</p>	
<p>Member moved employer</p>	<ul style="list-style-type: none"> • 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.

THREE STAGES OF RETENTION JOURNEY

STAGE THREE: LEAVE AND LAPSE (CONTINUED)

Ceased/suspended Direct Debit 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).

Ceased/suspended Direct Debit 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.

THREE STAGES OF RETENTION JOURNEY

STAGE THREE: LEAVE AND LAPSE (CONTINUED)

Organising Interventions

Where short term concentrations or longer-term patterns of high leavers 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 MyUNISON or by phoning UNISONdirect.

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 EasyJoiner 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>



BRANCH PRIORITY ACTION CHECKLIST

Branches can use the priority action checklist to assist with the three 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 a regional organiser.



Regular review of Organising Framework action plans to ensure they adequately address 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, please contact your regional office for templates.



MCT welcome calls by branch and/or region to clear each month's campaign, starting with "priority" campaign

This can be completed via WARMS/MERLIN access.



Branch joiner and leaver reports scrutinised at every branch committee

Branches to ensure the reports are listed as standard items on branch agenda, ensuring GDPR compliance is met when sharing members data.



DOCAS cleanse reports received by correct branch WARMS users and regional organisers ensuring RMS records are updated and maintained

Branches to set clear timescales for actions to be done to support cleansing of reports.



DOCAS cleanse reports urgently actioned by branch. Discussions with relevant workplace activists and 1-1 contact with members. Identify unintentional leavers and persuade others to remain in membership. Update DOCAS cleanse report and return to IMPS within given timescale.

Branches to discuss with regional organiser for requesting extensions to IMPS.

BRANCH PRIORITY ACTION CHECKLIST

(CONTINUED)



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

Branches to ensure 1-1 contact is made and using communications via all methods to promote the benefits of UNISON.



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.