



Strategic Organisational Change Project

Conference update

November 2020

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Introduction

With a union of over 80,000 members, Fórsa faces a challenge to build upon the considerable successes we have achieved to date. In order to realise the opportunities that exist to deliver better outcomes, it is essential to review all areas of our activities to ensure we have the capacity to best serve the interests of our members.

It was necessary to create internal staff capacity in order to identify priority issues for consideration and to scope a workplan. To that end, in the autumn of 2019, the union established a team of staff to work on a Strategic Organisational Change project.

The project group was tasked with the development of a 5-year strategic plan for the union. This involved the development of a set of organisational objectives and strategies to be applied commonly across Fórsa. The aim is to ensure a clarity and unity of purpose with the entire union working towards the same goals. In addition to the strategic plan, a number of change projects were identified for action and this report summarises the work of the project group to-date.

The work of the project group has involved significant consultation and engagement with people across all areas of the union including senior management, elected officers, branch activists, members and staff.

At every level, there exists an ambition to ensure that Fórsa becomes a better and stronger union. The delivery of these union-wide priorities requires a commitment from all to change and adapt our processes and supports. The work of the Strategic Organisational Change project is designed to support these adaptations and changes.

1. Strategic plan

Objective

Facilitate a process to create a five-year strategic plan for Fórsa, setting out Fórsa's key goals over the coming five-year period and a roadmap for our future. The strategic plan should provide focus and direction to advance the union's objectives, establishing a unity of purpose and common understanding of our priorities among members, activists and staff.

Progress

Fórsa launched a consultation portal for members, activists, branches and staff in November 2019 to commence an extensive consultation process on Fórsa's organisational priorities and activities. This consultation process was promoted through presentations to Fórsa staff, the NEC, all DEC's, the consultative council, branch presentations in each of Fórsa's regional office locations, and a special members' e-bulletin.

In the first phase of consultation, over one hundred written submissions were received via the portal. In addition to this, interviews were arranged with all members of the union's senior management team, elected national officers and divisional cathaoirigh. Workshops on each of the thematic areas were also held with the National Executive Committee. The inputs from the responses to the consultation were considered in detail and reflected in the development of a first draft of the concise version of the strategic plan. This went to a second phase of consultation to all of the relevant stakeholder groups, and all submissions were then considered in finalising the plan.

The final draft of the plan was endorsed by the NEC in October and will be presented to national conference.

Next steps

The final concise version of the strategic plan is being presented to Fórsa's national conference.

A basic version will also be produced which sets out Fórsa's overall strategic objectives, which will be distributed to all members and publicly accessible. There will then be a more detailed version of the concise version produced for activists and staff, which will include more information and detail recommended actions for each of the sub-goals and strategic objectives.

After the conference, an implementation strategy for the plan will need to be developed, which will involve staff, activists and branches throughout the union, and be overseen by the NEC and senior management team. National, divisional and organisational implementation plans across the union will be required for each strategic objective, with clear responsibilities, reporting lines and timeframes, to ensure that the overall objectives are met.

2. Join online

Objective

Develop an online joining option for Fórsa, making it easier for potential members to join the union.

Progress

The union researched a number of online joining options across the trade union movement, nationally and internationally. The union engaged a company, who specialise in the development of online joining systems for trade unions, to develop an online joining system that was user friendly, fast and efficient. This involved engagement from key stakeholders such as activists and staff. Currently, the online joining option is for potential members from employments where we have Deduction at Source (DAS) arrangements.

Potential members from DAS employments can join Fórsa [here](#).

The online application process streamlines our paper process and has a staged approach to joining, simplified into five steps. It captures an applicant's essential data and is fully compliant with GDPR requirements, reducing manual data entry whilst maintaining the integrity of the rulebook requirements that new members must be accepted by both branches and the NEC.

Next steps

The intention is to ensure better functionality that will include most employments and will also be rolled out for applications in non-DAS employments.

The overall objective will be achieved when all potential members can apply to join Fórsa through the online joining system.

3. Membership applications

Objective

Identify best practice recommendations to streamline Fórsa's membership application process and develop an optimal workable solution.

Progress

Following consultation with branches and staff, the intention is to streamline the member joining experience, improving and standardising the process.

There is an overlap between this project and the business process review within the membership system and technology review project.

Next steps

Following the completion of the business process review being carried out through the membership system and technology review project, we will develop a report outlining the findings of the project and make recommendations to assist with the improvement of the member joining journey and the processing of applications.

There will be an ongoing requirement for engagement with members and branches and appropriate staff.

4. Membership system and technology review

Objective

Assist with the development of a modern membership system for Fórsa. In addition to storing membership data, the system will be an all-in-one, one-stop-shop for branch activists, staff and a members accessing information and support.

Progress

Fórsa engaged an independent organisation who are union membership specialists to undertake a review of our membership system and business processes. The review highlighted that our membership systems are not meeting the needs of our union and must be replaced. This project brings significant benefits to Fórsa and will enable us to modernise our service to members and branches.

The project will deliver significant tangible benefits to members, branch activists and staff.

To date, detailed consultation processes and business process reviews have occurred.

Next steps

Fórsa will select a new partner provider. Branches will continue to be briefed and invited to contribute to the development and testing of any new system.

The intention is to transition to our new system at the end of 2021.

5. Branch supports, development and membership engagement

Objective

Undertake a branch audit and identify best practice across branches. This includes the development of a branch induction pack and standard information that can be used by all branches and committees. Assist with the development of a 'workplace representative's charter' that specifies and standardises the role of a workplace representative and clarifies the procedures and requirements for election/appointment. Help develop supports for branches and workplace representatives, and inter-branch co-operation.

Progress

Consultation with branches commenced on this project which was facilitated through Fórsa's consultation portal and written submissions were made. Regional branch workshops in Dublin, Cork, Galway, Limerick, Sligo and Mullingar were planned but due to the Covid-19 pandemic and the associated restrictions, these workshops had to be deferred. Research on the identified themes with our European counterparts had also commenced, but this too had to be deferred as a result of the impact of the pandemic.

Given that this item requires extensive engagement with branches, it was decided to pause progressing this item until such a time as this kind of engagement became more feasible.

Next steps

This project will recommence in January 2021.

6. Organising

Objective

Assist with the development of a standardised approach to organising, mapping and density building.

Progress

All organising and density building strategies begin with mapping. Mapping is a key process and it was a central starting point for the project. Work commenced to develop mapping tools and training for workplace representatives to introduce a standardised approach to mapping and organising.

The union has identified that the best way to commence this extensive piece of work, in advance of any rollout of a standardised approach, is to pilot it in one specific area. This allows us to learn from the pilot and evolve our approach.

It was agreed to pilot the training programme and mapping tools in the Local Government and Municipal Divisions in collaboration with the Strategic Organising Department. Branches in those Divisions have been invited to nominate representatives to work on the pilot which is a major initiative aimed at growing the union, building density and identifying new potential activists.

Next steps

We will continue to work collaboratively with the Strategic Organising Department. Following the completion of the pilot, we will evaluate the training, materials, structure and outcomes. This will assist with the rollout of a union-wide 'mapping toolkit' and training programme. Priority will be given to the development of infill organising strategies to assist with increasing trade union density across workplaces, grades and professions.

For specific organising strategies, it may also require additional research on how we can increase our relevance and connectedness to those in lower density employments or occupations.

7. Gender and diversity

Objective

To improve diversity in Fórsa's representative structures and staffing.

Progress

The union sought advice on best practice from the Irish Human Rights and Equality Commission (IHREC) on a proposed approach to auditing, analysing and mapping out solutions and initiatives. Following consultation with key senior elected representatives and staff responsible for equality, a brief was developed and the union engaged the services of an external independent consultant to assist with this critical work.

Next steps

An audit will be conducted to review gender, diversity and equality in Fórsa. The primary focus of this review will be on Fórsa's staffing and elected structures. Consideration will include the provisions of the union's strategic plan and the human resources and staff development report. This work will guide, inform, and frame the next stages of the process which will lead to a report and recommendations.

It is envisaged that this will be published early in 2021.

8. Sustainability and climate leadership

Objective

Develop a climate action and sustainability strategy, to set a roadmap for delivery on the Fórsa Sustainability Policy.

Progress

The union engaged a leading 'waste prevention focused' organisation to undertake an environmental audit and review of Fórsa. This commenced with an assessment of Nerney's Court in November 2019, followed by a benchmarking exercise of all Fórsa offices. Staff and activists who are active on climate and sustainability issues were consulted through a workshop held under the auspices of the 'Just Transition Network'.

The review has been completed and issued to the project team with the final environmental review report. This contains short, medium and long term recommendations to form the basis of a sustainability action plan for Fórsa. A carbon footprint report was completed which analyses Fórsa's carbon emissions, directly from on-site fuel combustion, and indirectly from electricity purchase, business travel and water consumption and treatment.

Key sustainability objectives as recommended in the report have already been incorporated into Fórsa's strategic plan, under strategic objective 'Creating a greener, more sustainable union'.

A number of 'quick wins' have already been identified and delivered upon, including the rollout of LED lighting and centralised printing. This has led to Fórsa's 'resource efficiency' score using the online green business tool progressing from 17% to 28% since November 2019.

Next steps

A sustainability action plan for Fórsa will be presented to the National Executive Committee. Following approval, an in-house 'green team' will be established to oversee the rollout and delivery of this plan.

9. Digital strategy

Objective

Develop a comprehensive digital strategy which better positions Fórsa to make use of new technologies and digital media to increase our profile and influence. Optimise our online engagement with members and potential members; making Fórsa a leader in digital.

Progress

In collaboration with the Communications Unit, a brief was developed containing the scope and objectives of the review of Fórsa's digital strategy. It was agreed that this would focus predominantly on social media and online content production, analyse Fórsa's current digital activity and include benchmarking against other unions and membership organisations.

We engaged a digital specialist to carry out this work. The review was carried out between mid-August and early October. It included in-depth collaborative workshops and engagement with members of the Communications Unit and the Strategic Organising Department. It included an extensive consultation with elected leaders and staff across the union.

Next steps

The report of the external consultant has been completed and received. This will help to finalise our digital strategy review report and inform our recommendations by the end of the year.

These recommendations also inform a section of Fórsa's strategic plan, and specifically the delivery of strategic objective 'Building our profile through effective public communications'. The report will include a set of digital Key Performance Indicators which are aligned with the overall strategic objectives of Fórsa.

10. Human resources and staff development

Objective

Develop a report with a range of recommendations that will assist Fórsa in creating an environment where staff feel that their concerns are being heard, their role and input is valued, there are structured opportunities for them to develop their professional skills and enhance their wellbeing, and can work to their potential.

Progress

The project group developed a report that was informed by a diagnostic review that was undertaken in late 2019 - early 2020, which was based on meetings and discussions with members of senior management. Discussions were also held with Fórsa officers and staff representatives. A desk review was conducted which considered a range of information including current HR roles and responsibilities, employment status data, policies and procedures, research on HR functions in trade unions and the staff consultation carried out between December 2019 and February 2020.

The report includes topics such as responsibilities and resourcing, standardised policies and procedures, recruitment and induction process, succession planning/handover and training and professional development programme.

This has a number of recommendations, including a clear need for a formal HR function within Fórsa and a new post to be created.

The report has been provided to the National Executive Committee, senior management and staff.

Next steps

The work of the project group is complete, however, decisions will be made at a senior level regarding the implementation of the recommendations.

Conclusion

A report of this nature can only offer a snapshot of the extensive work programme involved in designing the changes and processes required to make our union better, stronger and more effective.

In looking at the issues raised in this report it may be useful to reflect that our core mission is to create:

- **A union where members feel valued**
- **A union where activists feel empowered**
- **A union where staff feel heard and involved**

This is the mission that guides and directs the work of the Strategic Organisational Change Project. The primary purpose of the project is to ensure that, across all levels of the union, we have the capacity to best serve the interests of our members.

The initial phases of the work programme involved extensive consultation across the union. This has helped shape and develop the changes being brought forward for implementation by the union and has laid a firm basis for the development of the work programme.

The biggest requirement for everyone is to recognise that there has to be a sense of urgency and determination to implement the significant changes required to make Fórsa better and stronger. This is our own "Call to Action".

As the Irish proverb tells us: *"Ní dhéanfaidh smaointeamh an treabhadh duit."*

5 November 2020



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