

Institution: University of Birmingham		
Unit of Assessment: UoA 17, Business and Management Studies		
Title of case study: Driving Union Renewal		
Period when the underpinning research was undertaken: 2014-2020		
Details of staff conducting the underpinning research from the submitting unit:		
Name(s):	Role(s) (e.g. job title):	Period(s) employed by submitting HEI:
Andy Hodder	Senior Lecturer in Employment Relations	2012-present
Period when the claimed impact occurred: 2015-2020		
Is this case study continued from a case study submitted in 2014? No		
1. Summary of the impact <p>Hodder has been instrumental in revitalising a range of trade unions in the UK and internationally through shaping strategies of renewal, structural change, communications and membership. Specifically:</p> <ol style="list-style-type: none"> 1. Unions involved have changed their self-understanding, priorities and strategies, including revising strategic priorities and internal organisation. 2. Implementing structural change through new organisational practices to enhance membership, including the development of advocates which has contributed to cultural change, and increased membership internationally and amongst less well represented groups. 		
2. Underpinning research <p>Given the substantial membership decline facing unions across the globe, there has been significant academic and practitioner interest in understanding and developing strategies for effective union renewal, and an awareness of the pressing need to involve young people in trade unions and union activism. Across Europe, membership decline since 2000 has been occurring at a rate of 0.7% per year, dropping from 40.2 million to 36.1 million members in 2016 (Vandaele, 2019:10). Despite this decline, it is widely accepted that union members experience a wage premium over non-members (Bryson and Forth, 2017), and there is agreement that despite the potential negatives of union membership, unions are “on net, good for the economy and society” (Bennett and Kaufman, 2007: 4). Research undertaken by Dr Hodder at the University of Birmingham’s Business School directly addresses these issues. Hodder has developed a theoretical framework for understanding the complex interactions between a union’s identity, ideology and purpose, and how this ‘essence’ relates to strategies for renewal. Based on this theoretical framework, Hodder has investigated union activism, young workers’ engagements with unions and unions’ use of social media. Findings from this qualitative and quantitative work have shaped strategies for renewal in several UK unions.</p>		
Key Findings (KF) <ol style="list-style-type: none"> 1. Strategies for renewal and organising efforts must be connected with a union’s identity, ideology and purpose. The purpose of a union is to pursue objectives that reflect its identity and its ideology gives meaning to that purpose. Strategies arise from these connections and from the complex interactions between union leadership and members (R1). 2. Unions engage in internal processes of debate as well as external bargaining with employers and interactions with the state. Both these elements lead to the production of 		

strategies for action, which generate outcomes. These outcomes also have repercussions for union strategies (R1).

3. External factors, like government recruitment freezes, average membership age and a hostile industrial relations climate constrain union organising and growth (R1, R3).
4. Social media strategies can increase engagement with unions but they remain under-utilised (R5). Online presence and social media are particularly relevant for young workers and can help combat both negative portrayals and lack of knowledge about unions (R4, R6).
5. Local and national strike action is associated with significant increases in membership growth, with perceived injustice and union effectiveness motivating decisions to join. Vigorous union campaigning that includes strike action is likely to bring positive membership gains for unions, as well as helping to retain existing members (R2).
6. Initiatives aimed at encouraging unionism, particularly among young people, are often hampered by constraints on time (R3, R4) and on facilities, as young members may experience difficulties in getting advice and mentoring on union issues from older representatives (R4).
7. Training for existing members and activists is required as to how to best communicate, engage with and retain (young) members (R4, R6).

3. References to the research

R1. Hodder, A., and Edwards, P. K. (2015) 'The essence of trade unions — understanding identity, ideology and purpose', *Work, Employment and Society*, 29 (5): 843–854. DOI: 10.1177/0950017014568142

R2. Hodder, A., Williams, M., Kelly, J., and McCarthy, N. (2017) 'Does strike action stimulate trade union membership growth?', *British Journal of Industrial Relations*, 55 (1): 165–186. DOI: 10.1111/bjir.12188

R3. Hodder, A. (2015) 'Employment relations in the UK civil service', *Personnel Review*, 44 (6): 930–948. DOI: 10.1108/PR-09-2013-0160

R4. Hodder, A. (2014) 'Organising young workers in the Public and Commercial Services Union', *Industrial Relations Journal*, 45 (2): 153–168. DOI: 10.1111/irj.12049

R5. Hodder, A., and Houghton, D. J. (2015) 'Union use of social media: a study of the University and College Union on Twitter', *New Technology, Work and Employment*, 30 (3): 173–189. DOI: 10.1111/ntwe.12055

R6. Hodder, A., and Houghton, D. (2020) 'Unions, social media and young workers — evidence from the UK', *New Technology, Work and Employment*, 35 (1): 40–59. DOI: 10.1111/ntwe.12154

4. Details of the impact (indicative maximum 750 words)

Hodder has driven a renewal agenda and structural change across the Public and Commercial Services Union (PCS) and the British Dietetic Association Union (BDA), and helped shape the renewal strategies of umbrella organisations such as the Trades Union Congress (TUC) and Danish Confederation of Trade Unions. Specifically, these organisations have (1) changed their priorities and strategies and (2) implemented structural change.

1. **Adopting new strategic frameworks which reflect the organisations' identities, priorities and purposes to enable them to improve participation, engagement and communication**

- a) Trade Unions, both in the UK and Canada, have long recognised they need to revise their organising and strategic priorities to enable them to articulate their value, and relevance, to their membership. Hodder's research and advice has supported them to do that in line with their identity and purpose. For example, the Public and Commercial Service Union (PCS), co-designed with Hodder, a set of organising principles and objectives. This was underpinned by a recognition that these should "clearly reflect an individual union's identity, ideology and purpose, and that clear message should reflect members' priorities" (S1). This process began in 2015, and, in a new departure for the Union, were designed around

the fulfilment of strategic objectives: building (greater participation), growing (more members) and winning (issues).

- b) The PCS's 2017 Organising Strategy recognised that "it is important to have a common and consistent understanding of what organising means in PCS, grounded in ongoing academic research and best practice" (S2) which acknowledged Hodder's input and, for the 2018 and 2019 strategies (S3, S4), the General Secretary credits Hodder's "support as a critical friend to the union" (S3). Hodder's contribution is further recognised by the National Organiser of the PCS Union who confirms that "Dr Hodder has worked with us to help us revitalise our union strategy and through this build a stronger union identity." (S1)

In 2015, the PCS revised its communications strategy aiming to improve participation amongst its existing membership through greater direct messaging. This improved recruitment and retention by demonstrating the value of union membership, as part of its building and winning objectives. This recognised the challenges of communication with workers in a hostile environment, but was also motivated by a desire to improve provision of access to services for members, and improving user experience. (S1, S5). This drive to improve direct messaging and the use of social media for its membership was based upon Hodder's research (KF4, KF6). By 2018, the Union recorded the personal email addresses of 72% (up from 38% in 2014) and 59% mobile contact details (compared to 33% in 2014) of its membership and had a social media strategy (S1, S5). Adopting a strategic use of social media following Hodder's research (KF4) has also spread to a Canadian Union, the University of the Fraser Valley Faculty and Staff Association (S6).

- c) Trades Union Congress (TUC) strategies and policy to engage young people were influenced by Hodder. In 2015, in his role as advisor to the Midlands Trade Union Congress Young Workers Committee, Hodder organised national events as part of the TUC's young worker month, increasing the profile of union engagement with young workers within this organisation, and increasing public interest and engagement in research through organisation of these events. Impressed by this work, the TUC approached Hodder in 2016 to help them "develop a strategy to improve young worker engagement at the national level" (S7). Hodder contributed to a TUC Executive Committee Report, in which he identified key barriers to younger workers engaging with unions (KF4–KF7) and proposed a number of solutions (KF6, KF7). According to the Deputy General Secretary, Hodder's work and this report "shaped discussions at the TUC and raised understanding of issues relating to young people and trade unionism" and, as a direct result of these recommendations, they have "made real changes to how the TUC engages younger workers" (S7). These changes included the introduction of a larger range of "pull" factors to entice young people into trade unions" (S7).

Outside of the UK, young workers have been put on the policy agenda and specific union policy has been influenced through the delivery of training sessions for a delegation of senior trade union officials from the Danish Confederation of Trade Unions (FH) led by Hodder at the University of Birmingham in 2017, as well as designing and conducting training for the Youth Committee on the European Trade Union Confederation (KF4, KF6–KF7). In the Danish case, it enabled FH delegates to learn from the experiences of UK unions and confirmed existing policy direction of the FH and the ETUC (S8). "These interactions have allowed us [FH] to learn from the experiences of UK unions and have both confirmed our decision to increase our focus on young worker engagement and shaped our thinking as to how we can do this" (S8).

2. Unions are adopting organisational structural changes to help reflect their changed strategic objectives

Through adopting new organisation practices, Unions (PCS and BDA) have been able to fulfil their ambitions to improve participation, representation, inclusivity and membership. The PCS sought to address this in 2016 by creating the new role of Union Advocate. To date, the PCS has recruited 4,000 Advocates who act as voices for the PCS within the workplace, in an informal, flexible role without requiring people to take on the full role and responsibilities of Union Representative (R2–

R4; KF6–KF7). The Union has found that recruits to this new role are more involved in actively supporting the union by raising visibility, acting in workplace campaigns, mobilising members to use their votes and promoting the union to non-members (S5). According to the PCS National Organiser: “Dr Hodder has been central to implementing this strategic approach and consequent organisational structure of the union” (S1). The PCS considers itself to be a stronger and more active PCS union with increased representation and levels of membership. Witnessing the success of this role, the BDA introduced a similar position the ‘Workplace Contact’. According to the BDA Communications and Organising Officer, “Hodder was responsible for the creation of this role and the accompanying standards, guidelines and training for this position [. . .] These roles will play a critical part in the delivery of the BDA Trade Union Organising Strategy” (S9).

The benefits of this organisational change affect both the individual member and the Unions, and produce a) a more open culture by making engagements easier between the grassroots and organisation, and b) increasing membership numbers.

- a) The changes have resulted in a more engaged union membership and opened avenues for members to shape their union. One PCS advocate stated, “I’d like to be a part of those changes and have my opinions heard, that’s why I’m now advocating for the union” (S5). One member reported “I can make a difference as an advocate”, and another noted “you feel you are doing something worthwhile” (S5). The flexibility of the role (KF6–KF7) is particularly valued, one member reporting that “I can give as much or as little of my time as I can” (S5). Union Advocates have also allowed branches to be proactive in addressing succession planning and member participation amongst currently under-represented groups of members: “The advocates have done an incredible job, and a few of them have become reps.” (S5) The PCS Union has also increased levels of female activists, growing the percentage of female activists from 43.4% in 2016 to 45% (there are now 3,154 female activists) in 2019 (S1). This is in a context when many other UK unions are still in decline (R2).

The BDA increased engagement and union activism through training of 40 BDA reps by Hodder at the BDA conference. As a result of this training, “reps have expressed an enhanced interest in the role and direction of the union” (S9). Further, through the above structural changes and training, the BDA reported “increased levels of engagement within the union” (S9). Further shift in union practice is exemplified by the BDA hosting their first ever reps conference in October 2019. According to the BDA Communications and Organising Officer, this was due to Hodder’s influence and “This was an important milestone for the BDA (the BDA became a union in 1983) and reflected a significant shift in practice in order to become a more inclusive, democratic and participatory organisation” (S9, S10).

- b) In PCS, membership has increased, particularly amongst under-represented groups. For example, a union member at Department for International Development mentioned the advocate approach as being “key to their branch signing up hundreds of new members” and documented “a recruitment bounce [. . .] we now have a couple of people in our overseas departments who are creating a network of overseas reps. All of this work is through the advocates, because they are in the teams and in their networks and they are having the conversations. They are a very mixed group — younger people, a married couple, new people, long-servers, parents” (S5). Overall, PCS has both reduced and slowed its membership decline, whilst also improving its recruitment. In 2015, PCS lost 36,051 members (S11). After adopting the revised strategy, this figure reduced to 9,956 in 2016, 3,408 in 2017 and 1,371 in 2018. At the same time, the new strategy resulted in the highest level of monthly recruitment of any non-strike month, recruiting on average 1,000 new members a month. In 2016–18, this rate of recruitment increased to 1,200 members per month, a significant achievement in the current public sector context (S3; KF3). Growth has also resulted in the recruitment of significant numbers of young members, who are frequently more vulnerable to workplace exploitation, increasing from 3.7% in 2016 to 5% in 2019 (S1).

5. Sources to corroborate the impact

- S1.** Testimonial from the National Organiser of the Public and Commercial Services Union (11th September 2020) [Available as PDF]
- S2.** Public and Commercial Services Union [National Organising Strategy \(2017\)](#) [Available as PDF]
- S3.** Public and Commercial Services Union [National Organising Strategy \(2018\)](#) [Available as PDF]
- S4.** Public and Commercial Services Union [National Organising Strategy Part 2 \(2019\)](#) [Available as PDF]
- S5.** Public and Commercial Services Union website testimonies and articles on the role of Union Advocate: '[Why I became a PCS advocate](#)' (June 2018); [PCS Advocates can help create a 'union culture'](#) (October 2018); '[The most effective way to change things was by recruiting advocates](#)' (2020) [Available as PDF]
- S6.** Morry, L. (Communications Chair) 'A Conversation on Discourse' in University of Fraser Valley Faculty and Staff Association Newsletter *Words & Vision* (February 2016) vol. 24, no. 3: 5 [Available as PDF]
- S7.** Testimonial from Trades Union Congress (2nd November 2020) [Available as PDF]
- S8.** Testimonial from The Confederation of Danish Trade Unions (FH) (30th October 2020) [Available as PDF]
- S9.** Testimonial from British Dietetic Association Union (2019) [Available as PDF]
- S10.** British Dietetic Association Union magazine citing Hodder's work with the union (November 2019) [Available as PDF]
- S11.** Public and Commercial Services Union [National Organising Strategy \(2016\)](#) [Available as PDF]