

Membership and Technology Project – update January 2021

There is a clear need to improve our systems for activists, staff, and members. The Membership and Technology project involves a considerable commitment and has seen significant engagement with a large number of people through multiple working groups across the union.

The project aims to ensure that our technology underpins the drive to grow the union and ensure that we support activists and staff with the tools to carry out their roles and functions.

This is more than a technology project. It is in essence the essential tool to enable the transition from the past and will significantly improve all aspects of union activity into the future. It will aid greater connectivity with members and presents a modern approach to trade union activity; it will be the manifestation of who we are and how we do our business. We are determined to ensure that all of the key stakeholders in our union are heard and involved in helping design and test the new systems.

In 2020, the Hart Square business case delivered a detailed roadmap for Fórsa technology that enables growth through the years of the current strategic plan, 2020 – 2025. In reality, this is a much longer term investment decision that will help us transform the union.

By the end of 2021, the implementation project will deliver:

- ❖ A single, streamlined, standardised Fórsa membership system.
- ❖ A web solution and tools which offer branches up-to-date, accurate data, and greater ways of communicating effectively.
- ❖ A data migration that offers accurate, consistent information and supports efficiency and effective communication.
- ❖ A set of staff and branch-supporting processes that are streamlined, standardised, and nimble enough to manage the variance across Fórsa member types.
- ❖ A staff toolkit and capabilities that support self-sufficiency and inclusion in ongoing technology change and development.

Partner Selection

The union developed a detailed ITT document (invitation to tender) following numerous workshops and sessions with various staff departments. Similar workshops and sessions were conducted with the union officers.

The Partner Selection Panel was made up of Ann McGee, Kevin O'Malley, Matt Staunton, Eoin Ronayne, Katie Morgan, and Richy Carrothers.

Five companies were identified as having the necessary skillset and product range necessary to meet our needs. Four companies responded and engaged in the process. This required detailed exchanges of documents and an intense meeting schedule of more than thirty-two hours. After extensive engagement, review, and reference validation, the Selection Panel has unanimously recommended the decision to go with APT (www.ptsolutions.net).

The NEC has endorsed the decision to proceed with APT.

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APT has a significant presence in the provision of CRM and Technology Services across the Trade Union Movement. APT will make introductory presentations across the union in due course.

Town-Hall Meetings

Town-Hall style meetings took place in December 2020 on the Membership and Technology Project. Separate meetings for staff and branches occurred via WebEx and both were well attended with good engagement by way of a Q & A. The presentation was subsequently issued out to all branches and staff.

We have committed to quarterly update meetings to provide progress reports and further information.

Key Working Groups

Two critical working groups have been established that will be essential in helping shape, develop, and test the new system.

Branches: An Expression of Interest exercise was conducted across the union seeking nominees to the Branch Working Group (BWG). The BWG is made up of branches from across the union spectrum; division, geography, and size. The first meeting occurred in December 2020 with further monthly meetings scheduled for 2021.

Staff: Staff involved in the various working groups and Business Process Review (BPR) meetings were nominated to take part in the Staff Working Group (SWG). It is made up of nominees from across sections of the union staff/business units – Communications, Administration, Membership, Finance, Industrial, and Organising. The first meeting occurred in December 2020 with further monthly meetings scheduled for 2021.

Business Process Review

Intensive workshops and feedback sessions were held across union staff departments to capture and review the current working practices. Similar sessions were held with the union officers. As part of this process, people also identified “critical asks” that they would like any new system to be able to do to support their work.

It is necessary to document and map current work practices to improve and standardise our processes. This will ensure that any new system supports the work of key users such as staff and activists.

Survey

A survey will issue shortly to all staff and Branch Chairs/Secretaries to supplement the research already undertaken. This will further help the union understand where and how data is held and is critical to make informed decisions on data migration. The survey should take no more than five minutes to complete being cognisant of the pressures and demands on staff and activists currently.

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Project Management

The Fórsa resourcing for the project will be:

Project Sponsor: Matt Staunton

Project Business Lead: Richy Carrothers

In addition to Ruth Crowley and Gary Hearne, the Project Team will be finalised in due course.

Hart Square will assist in project oversight:

Project Sponsor: Chris Gilbert

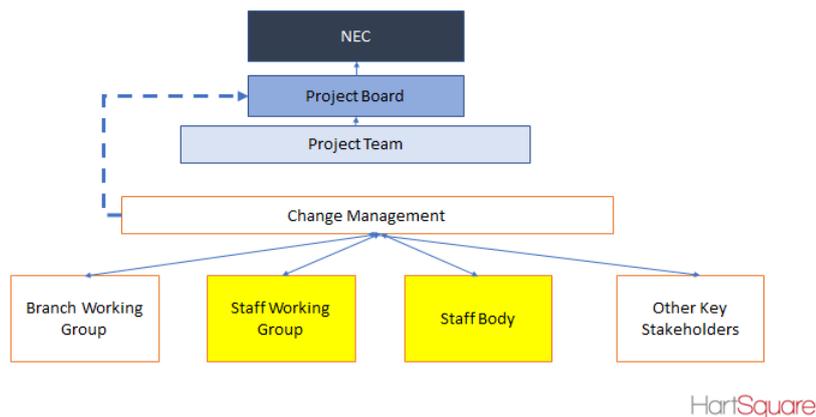
Project Manager: Helen McGrath

APT will finalise Project Sponsor and Project Manager in due course.

The project will be overseen by a high-level Project Board and the day-to-day work directed and supported by the Project Team.

Project oversight is captured as follows.

Fórsa's change network



The Project Implementation Document (PID) is being finalised and will detail roles, responsibilities, and methodology, etc.

Next Steps

We will commence intensive contract negotiations, though the priority in the meantime is to finalise processes to enable discovery by APT and for them to access initial data.