

## CFATURC2

### Develop, organise and contribute to the recruitment and retention of union members v2



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#### Overview

This unit is appropriate for you if your role involves

1. identifying potential and recruiting new union members
2. encouraging union membership
3. retaining union members
4. organising union members

The activities you are likely to be involved in

1. mapping the workplace and identifying opportunities for recruitment
2. estimating the resources needed for the recruitment strategy
3. identifying appropriate opportunities for recruitment and retention activities
4. producing appropriate materials such as letters, leaflets, notices and posters
5. identifying potential members and making contact with them
6. conducting recruitment meetings
7. keeping membership records
8. maintaining regular contact with members
9. helping the union develop more effective recruitment procedures

The elements are:

1. developing a recruitment and retention strategy
2. prepare and present promotional information to potential members maintaining contact with and information about members
3. advising on recruitment and retention

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### Performance criteria

*You must be able to:*

#### **Develop a recruitment and retention strategy**

- P1 identify local factors and potential tensions likely to affect recruitment and retention
- P2 apply national recruitment and retention policies
- P3 consult colleagues and members on appropriate and relevant materials which will maximise local recruitment
- P4 identify recruitment and retention opportunities and methods which are suitable for local circumstances
- P5 request information about potential members in line with agreed procedures where there are recognition agreements in the workplace
- P6 identify methods of contacting potential members where no recognition agreements exist
- P7 identify potential conflicts of interest and seek appropriate procedural guidance from specialists
- P8 negotiate and reach agreement with other unions to maximise potential membership and retain effective inter-union relations
- P9 make sure that recruitment systems and strategies are regularly monitored and reviewed for effectiveness in maintaining and processing membership
- P10 following monitoring and review make recommendations for improvements

*You must be able to:*

#### **Prepare and present promotional information to potential members**

- P11 make effective use of workplace opportunities for recruitment of individuals
- P12 deal promptly with individual and group enquiries about membership
- P13 provide individuals and groups with clear and accurate information on the features, advantages, benefits and rights associated with union membership
- P14 counter negative responses with persuasive arguments and relevant factual information
- P15 select and obtain recruitment materials
- P16 modify, package and present materials to meet the needs of different groups of members
- P17 arrange presentation and recruitment meetings at times and locations which maximise potential attendance
- P18 advertise meetings in visible and accessible locations
- P19 make presentations in a manner, style and pace which is suitable for the audience and which promotes goodwill

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P20 provide opportunities for potential members to ask questions and seek clarification

P21 keep complete records of attendance and pass information on to the appropriate people

*You must be able to:*

#### **Maintain contact with and information about members**

P22 make sure membership applications are processed promptly and accurately

P23 monitor significant factors and characteristics of recruitment and membership including equality and diversity

P24 make sure that recruitment and membership information is audited, summarised clearly and passed on to officers of the union and specialist departments

P25 make sure that recruitment patterns and the results of campaigns are monitored, analysed and recorded

P26 make sure significant variations in recruitment are summarised and details passed to the appropriate people

P27 make sure appropriate levels of contact are maintained with members no longer in employment

*You must be able to:*

#### **Advise on recruitment and retention**

P28 provide representatives with clear, accurate and up-to-date information on recruitment and retention policy, priorities and national campaigns

P29 encourage and assist representatives to select appropriate and relevant resources which will maximise local impact

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### Knowledge and understanding

*You need to know and understand how to:*

#### **The nature and role of member recruitment and retention**

- K1 make effective use of workplace opportunities for recruiting individuals
- K2 find out about regional and national campaigns
- K3 present the benefits of membership
- K4 operate within trade union priorities and national campaigns
- K5 identify any local factors and potential tensions likely to influence the strategy
- K6 consult with colleagues and members
- K7 work within recognition agreements
- K8 make use of contact procedures where no recognition agreement applies
- K9 evaluate significant factors in recruitment
- K10 monitor and review systems and strategies for effectiveness
- K11 present recommendations for improvement

#### **Principles and concepts**

- K12 process enquiries and applications
- K13 make use of appropriate sources of information and advice on recruitment and retention
- K14 obtain and modify appropriate recruitment materials
- K15 advertise meetings effectively
- K16 prepare and present recruitment information
- K17 make use of local examples and issues
- K18 keep an audience interested
- K19 encourage questions
- K20 identify types of conflict of interest and how they may arise

#### **External factors influencing recruitment and selection**

- K21 identify relevant employment law and codes of practice which apply to union recruitment and retention

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