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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:**

5. Mapping the workplace and identifying opportunities for recruitment.
6. Estimating the resources needed for the recruitment strategy.
7. Identifying appropriate opportunities for recruitment and retention activities.
8. Producing appropriate materials such as letters, leaflets, notices and posters.
9. Identifying potential members and making contact with them.
10. Conducting recruitment meetings.
11. Keeping membership records.
12. Maintaining regular contact with members.
13. Helping the union develop more effective recruitment procedures.

### **What the unit covers:**

14. Developing a recruitment and retention strategy.
15. Preparing and presenting promotional information to potential members.
16. Maintaining contact with and information about members.
17. Advising on recruitment and retention.

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

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### Performance criteria

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

*You must be able to:*

- 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.

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

*You must be able to:*

- 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.

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- 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.
- 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.

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

- You must be able to:*
- 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, regularly updated, 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.

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

- You must be able to:*
- P28 Provide representatives with clear, accurate and up-to-date information

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

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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

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

*You need to know and understand:*

- K1 Workplace opportunities for recruitment.
- K2 Regional and national campaigns.
- K3 The benefits of membership.
- K4 Trade union priorities and national campaigns.
- K5 Local factors and potential tensions likely to influence the strategy.
- K6 Methods of consulting colleagues and members.
- K7 Recognition agreements.
- K8 Contact procedures where no recognition agreement applies.
- K9 Significant factors in recruitment.
- K10 How to present recommendations for improvement.

#### Principles and concepts

*You need to know and understand:*

- K11 Enquiry and application processing.
- K12 Sources of information and advice on recruitment and retention.
- K13 Appropriate recruitment materials.
- K14 Effective advertisement of meetings.
- K15 Effective presentations of recruitment information.
- K16 Use of local examples and issues.
- K17 Audience engagement methods.
- K18 Techniques to encourage questions.
- K19 Types of conflict of interest and how they may arise.

#### External factors influencing recruitment and selection

*You need to know and understand:*

- K20 Employment law and codes of practice which apply to union recruitment and retention.
- K21 Social and economic factors which affect the profile of members and potential members.

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**Originating organisation** TUC

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**Original URN** CFAUC2

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**Relevant occupations** Trade Union Representatives and Professionals

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**Suite** TUC Core Trade Union role

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**Key words** representing union; promoting union; union campaigns; union equality or opportunity; union policies; union initiatives