

TUC digital healthcheck user guide

**Union digital maturity self-assessment
tool. V3**

Introduction

Thanks for downloading the TUC Digital Lab's digital healthcheck tool. We hope you'll find it useful in assessing your union's progress with the evolution of your digital strategy.

We've looked into seven aspects of digital maturity for unions: strategic approach, digital in the organisation, membership, communications, web presence, data, and IT and systems.

The healthcheck tool is an interactive spreadsheet, to be opened in Microsoft Excel. You can use it to rate your union's progress to date by checking the button in each row that you think is nearest to representing the current position in your union.

There are no 'right' or 'wrong' scores; this is simply a means to snapshot your current position on the digital maturity journey.

Progress is shown on the charts on the Survey Results tab of the spreadsheet, which contains a visual representation of your scores, to help highlight areas you might want to focus on more closely. The report page is formatted for printing or exporting and sharing.

The degree to which different scores will be relevant to you will vary a bit, depending on your union's size and focus, but the tool should help you understand more about the principles you need to interpret for your own union, and the type of digital capabilities you want to develop.

Using the tool

Whilst anyone is free to use the tool to gain insights into their organisation's digital maturity, we suggest that you will get the most out of it if it's used to start a conversation within your union.

If you can, convene a small group to go through the tool, with different departments able to feed in their own particular insight. An ideal group might combine senior colleagues from communications, membership and IT functions.

If it's helpful, the TUC Digital Lab are able to help join a group to use the tool in your union.

Once complete, we recommend you that save and date a copy of the completed Self-Assessment file so that you can come back to it in the future, re-evaluate and measure your progress against a previous benchmark.

This is a 2020 update of our original 2017 digital healthcheck. We've reorganised the categories a little, to look at how unions are adapting a digital culture in their organisations. Some questions have had an update too, where realistic expectations or technical possibilities have moved on in the last three years. But there should still be a broad degree of read- across for unions who want to update

You are not in any way obliged to share your results with us at the TUC Digital Lab - but if you do want to send us your results then it will help us to build a picture across UK unions of varying size and focus (which we will anonymise if sharing).

If you'd like help with using this tool or advice on your Union's digital journey generally, please contact TUC Digital Manager John Wood on jwood@tuc.org.uk or 0207 4671269.

Interpreting the questions

We have tried to keep the questions where possible to principles and approaches rather than to specific software or suppliers, as different tools will be more or less appropriate to different situations.

Strategic approach

Digital tools can be fast and low cost to set up, and it's easy to experiment with smaller scale digital initiatives in isolation. But these tools can have much greater impact when their use is properly aligned to an overall organisational strategy that has a proper understanding of digital's new environment and new possibilities. This section seeks to understand how far digital understanding is built into your union's strategic direction and processes.

Digital in the organisation

In order to make the best use of digital in your union, you'll need to support it with organisational structures and resourcing. How you devote resources and support your people will enable you to move digital from an add-on to becoming a mainstream way of working. There are also ways of working that will increase your union's chance of making a success of digital projects, such as making sure decisions are led by data, and that users of any new system are involved as fully as possible in its design.

Membership

At the core of any union's digital offering are its membership systems. Holding full and up to date information on your members and being able to act upon it in the most effective way will give you the greatest chance of success in mobilisation. Effective systems will give you insights into key trends happening inside the union and will allow you to personalise the relationship more fully to increase relevance of communication and the impact they can have.

Communications

Digital brings a wide range of new direct communication techniques within reach of unions, helping to deepen engagement between members and the union. Different channels of digital communications will find greater resonance with different unions and their memberships - for example a union may need to focus more on mobile technology if their members are less likely to have use of a computer at work or at home. This section also looks at how you are developing a wide variety of communication channels and rates the effectiveness of the systems you can use to increase member and supporter engagement.

Web presence

A union's core website needs to be able to act as a first point of contact for people wanting to interact with the union. Effectively carrying out all their potential tasks with an organisation online is now an expectation for a majority of people, but doubly so for younger generations of members and potential members. This section assesses the technical systems and editorial processes you have in place to run your site, but also the standards that enable users to have the easiest possible interaction with you online. Ensuring your site works well for everyone is a good way to maximise the impact of your website spending, resulting in fewer lost interactions.

Data

Since the advent of IT in the union world some 30 years ago, information management policy has had to accommodate the exponential proliferation of data with structured growth of storage, accessibility and effective security. Newer regulations under GDPR means that unions need to be able to demonstrate high quality data protection standards throughout the organisation, right down to grass roots level. The reward for such well-designed and implemented data management practice is huge audience insight and analytics, driving better and even more insightful union and member services.

IT & systems

Key to successful digital outcomes, a union's core IT systems and infrastructure must have the flexibility and scalability to match demand, and do it rapidly. The scope includes bandwidth, overall capacity, transactional speeds and access from anything, anywhere. This section looks at your IT Policies, Hosting, Network (and its Security), together with the underlying service desk approach that supports your IT and your core applications of HR and Finance, Intranet and Document Management.

Glossary

Cloud: A network of remote servers hosted on the Internet, and used to store and publish data, as opposed to having data stored on a local server or computer within the organisation. Cloud computing can allow greater flexibility and ease of access, and lower management overheads in providing the server power an organisation needs.

CMS (Content Management System): An administrative interface for your website, allowing you to create, edit and structure the site's pages from within your browser, without needing to install specialist editing and file management software. With the right workflow processes, a CMS can allow more of your people to directly manage the content of your website, with reduced equipment and specialist skills.

Content strategy: The planning, development, and management of content - particularly in the context of websites. An organisation's content strategy seeks to map out its various audiences' needs and establish structural and editorial principles that will help get the right content to the right user at the right time.

CRM (Customer Relationship Management): A variety of systems and approaches that seek to gather and classify information about an organisation's customers, providing useful insights to relevant teams in the organisation and enabling servicing of those customers online to be performed more effectively, accurately and potentially with greater automation.

CIO / CTO (Chief Information Officer / Chief Technical Officer): A senior executive with specific responsibility for the technological systems and related processes that an organisation needs to reach its goals.

DDoS (Distributed Denial of Service attack): A form of attack on an organisation's IT systems that uses multiple computers to submit repeated requests to a system in an attempt to overwhelm its capacity. The computers used are often controlled by malware and being co-ordinated to take part in the attack unwittingly. This type of attack doesn't infiltrate the network but seeks to knock the target offline and damage the organisation's capacity to operate.

Digital maturity: Digital is about more than the nuts and bolts of technology. In this context we mean it to encompass the new possibilities opened up by the technology and by the social changes and expectations that the technology has brought about. Digital maturity is a process rather than a stage. The possibilities in digital are constantly evolving, and the accurate and immediate feedback digital technologies provide means digital projects naturally fit a cycle of iterative development and testing for continual improvement.

Digital transformation: Redesigning an organisation's services and processes from first principles to fit the new expectations raised by digital technologies. This often means reinventing services with much greater understanding of user need, or user-led design.

Disaster recovery: A set of policies and procedures to enable an organisation to resume operation swiftly after a catastrophic failure or disruption, natural or human-induced. If access to key IT infrastructure becomes impossible, a disaster recovery plan should enable a backup system to be brought into play as quickly as possible.

EDMS (Electronic Document Management System): A digital system to store and publish documents, tracking and managing changes and versions. The aim is to reduce reliance on paper documents by making the right copy of key documents available readily to the right people.

Extranet: A secure website that allows a defined group of stakeholders access to information and tools not generally made public. This could include dedicated content for reps and lay leaders that is not visible to ordinary members.

GDPR (General Data Protection Regulation): A European Commission Regulation to strengthen and unify data protection for individuals within the European Union (EU). It also addresses export of personal data outside the EU. It replaced the UK's DPA in May 2018.

IAAS (Infrastructure As A Service): Cloud provision of hardware on demand, such as servers, storage and networking. Allows flexibility and change to IT infrastructure provision without having to buy and manage physical resources.

ICT (Information and Communication Technology): Technological tools used to communicate, and to create, disseminate, store, and manage information. ICT is an extension of the term IT (Information Technology) to stress the use of unified communications made possible through networks.

Intranet: A website only visible inside your organisation, containing the key information and tools that your people need to do their jobs.

Knowledgebase: Knowledgebase use ranges from simple online FAQs to sophisticated, self-learning software platforms that serve a need for information derived from unstructured data sources. Invariably the goal is the same - to provide the fastest access to an accurate answer to a question or problem; and if the question or problem has been raised before, to make the answer widely available thereafter.

Malware: Short for "malicious software", this is any piece of software designed to disrupt or abuse computer systems. It encompasses viruses (which produce copies of themselves to infect other systems), trojan horses (which misrepresent themselves as useful content or software to trick users into installing them), rootkits (which hide malicious software inside a computer's operating system) and more.

Open Source: Software that has been developed openly by a community of developers, where the source code is released free for all to use. This is as opposed to proprietary software, owned and controlled by a particular supplier. For example, popular open source Content Management Systems include Drupal and WordPress. Open source software can be cheaper as popular systems will be updated to meet new standards, and a wide variety of custom functions may available from the community. Other advantages include greater control of your system, and greater flexibility in moving between suppliers. Open source systems may have an increased overhead in keeping the software up to date in a timely fashion to keep it secure, over less well-known proprietary systems which may be less of a target for hackers.

SaaS (Software as a Service): Computer application software provided over a network to users as required and licenced on a subscription basis, rather than purchased and installed on each local computer. This could range from desktop office applications to shared data systems.

SEO (Search Engine Optimisation): The technique of structuring content, so that it is more easily indexed and found on web search engines. This comprises both the writing of the content itself and the technical delivery of that content. A well optimised web page is much more likely to be found by users.

SLA (Service Level Agreement): A contract between a service provider and customer that defines the level of service expected from the service provider. SLAs are output-based in that their purpose is specifically to define what the customer will receive. For example, a web hosting SLA may specify a guaranteed server uptime of 99.9%, and any financial penalty to the supplier if this is not met, meaning the client's website was unavailable for longer than that time.

VPN (Virtual Private Network): A network allowing a user to connect securely over the internet into an organisation's private network. A VPN allows users to access private functionality from other locations.

Background: Why the TUC are focusing on digital maturity?

There is a digital crisis in trade unionism. As a movement, we too often fail to offer a good-enough digital experience to members and activists – and this is leading to us being less effective and appealing, especially to younger members.

We need to develop digital-first routes of interaction with our organisations, to make it easier for younger potential members to interact with us in the ways they now expect to be able to with any organisation or company.

At the same time we need to increase our depth of engagement with members beyond the activist base, helping us more easily beat strike ballot thresholds where needed, and letting us better directly access sources of consumer- and community power to complement our industrial power.

The challenges of adaption to new legislation, from the Trade Union Act to GDPR also demand a greater focus on digital maturity within unions. We need to improve our systems and the data we hold within them, to avoid increased reporting overheads. We need to be able to establish accuracy and swifter processes to deal with potential problems around use of personal data across our organisational functions.

Unions will need to develop their own specific ways of doing some of these things, but the union movement also needs to be closer to the levels of digital maturity currently accepted as good practice within major charities, or in the private sector.

With the rise of disruptive opportunities for organisational efficiency and collective collaboration unheard of 10 years ago and led by the internet, computers and smartphones, unions have opportunities to transform their operations and their relationship with their members.

Digital practitioners in a number of different unions have already made good progress in many areas. The TUC's Digital Lab project brings unions together to help establish and share good practice, and to spread the understanding of digital transformation possibilities and techniques more widely across our movement.

You can follow news, resources and events from the TUC Digital Lab online at **digital.tuc.org.uk**

This edition of the TUC Digital Healthcheck was developed by the TUC Digital Lab in conjunction with Simon Parry of tech consultancy Infobo.com. It is an update of our original 2017 tool, which was developed in conjunction with Stephen Pye of Acert Associates.