ORGANISING AN INDUSTRIAL ACTION BALLOT DURING THE COVID-19 PANDEMIC: THE CASE OF A UK UNIVERSITY AND THE UNIVERSITY AND COLLEGE UNION

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Abstract

The aim of the paper is to explore and extend, theoretically and practically, our understanding of union organising during a global health and economic crisis, restrictive strike laws, and where members are highly dispersed and accessible only via Internet-based technologies. Specifically, the paper explores one union's approach to organising a statutory ballot campaign (get the vote out or 'GTVO') to prevent compulsory redundancies in a UK university during the first year of the Covid-19 pandemic. The paper draws on theory related to traditional, GTVO and technology-driven organising. A single case study approach is applied, an approach that draws on interviews with members of a union team, effectively a steering group, set up to organise and mobilise as many members as possible to vote in the statutory ballot. The approach also draws on findings from a survey of members who were organised during the campaign, highlighting what aspects of organising made the difference between voting or not in the ballot. The main findings from the interviews are a behind the scenes account of how a team of four managed to deliver a resounding mandate for industrial action, which proved key in resolving the dispute by avoiding compulsory redundancies. The study makes a range of contributions to theory, such as extending theories based on traditional, GTVO and technological-based organising. The findings also have practical implications, specifically in terms of providing a range of recommendations for union organising surrounding statutory ballots. More research is required though, to test out and extend the theoretical and practical contributions of the study.

Keywords: Collective bargaining, Covid-19, Organising, Technology, Trade Union Act 2016

Introduction

Research has captured the many challenges UK trade unions face, such as organising to prevent factory closures and redundancies (Blyton and Jenkins, 2013), pressuring employers to pay the 'living wage' (Lopez and Hall, 2015), resisting financialisaton (Rothstein, online early), opposing contingent employment practices (Simms and Deans, 2015), improving working conditions for homeworkers (Burchielli et al. (2008), and beating legislation designed to restrict industrial action (Richards and Ellis, forthcoming). Since the onset of the Covid-19 pandemic, trade unions have faced many added challenges. On top of 'bread and butter' challenges, unions have issued law suits to protect worker rights (De Campos Silva, 2020), been involved in national crisis management (Fay and Ghadimi, 2020), raised new health and safety concerns (Watterson, 2020), attained pandemic leave for causal workers (Foley and Williamson, online early) and successfully lobbied for a nationwide furlough scheme and greater provision of PPE for healthcare workers and workers coming into close contact with colleagues and customers (Hunt, 2021). While UK unions have risen to such challenges, with efforts recognised by significant rises in union memberships (e.g., see Elliot, 2021), there remains gaps in our understandings of what unions have faced, how they have responded, and what they have achieved in such monumentally difficult times, times where new and traditional challenges have come together to test the most organised of unions.

As noted already, research has been conducted under Covid-19, but a good proportion of that work draws on secondary accounts of union achievements. The current study, however, is based on primary research, and represents a vital opportunity to add to organising theory because the case involves successfully resisting redundancies at a time of mass anxiety, as well as when governmental expectation of working from home was at its peak. The study makes an important contribution to knowledge for a range of reasons, such as researching union organising in extreme circumstances – during a pandemic, under new increased legal constraints regarding industrial action (e.g., Porter et al., 2017), involving a dispersed workforce (e.g., Burchielli et al., 2008), relying heavily on Internet-based technologies (e.g., Wood, 2015). Further, whilst findings are likely to stretch current organising theories to their limits, they are also likely to generate important recommendations for union leadership/organising practice.

The research is a single case study of the organising a branch of UCU undertook to resist threats of compulsory redundancies, in a UK university, during the first six months or so of the Covid-19 pandemic. The study focuses on the centre point of what won the dispute for UCU – a successful 'get the vote out' campaign (GTVO) for industrial action, which proved critical in the union negotiating a no compulsory redundancy collective agreement. As such, the broad aim of the paper is to explore

and extend, theoretically and in practical terms, union organising during a global health and economic crisis, highly restrictive strike laws, and where members are highly dispersed and accessible only via Internet-based technologies. The research questions were as follows:

1. From an organiser perspective, what approaches to organising makes for an effective campaign for industrial action?
2. From an organised member perspective, how important are a range of organising interventions in the wider mobilisation of members?

The aim and questions are explored first in terms of contextualising the study and theorising the organising challenges faced by the union. Second, is a discussion of methodology, a case study approach involving interviews with organisers and a survey orientated towards members organised during the campaign. In the third section organiser insights and member perspectives are analysed and more broadly discussed. The paper ends with a conclusion section, a reflection on the research questions, discussing theoretical and practical implications, plus a consideration of study limitations and future research.

Contextualising and theorising the research: A pandemic, threats of compulsory redundancies and organising theory

There are four discrete, yet inter-linking sub-sections to this main part of the paper, setting out the wider, industrial and local contexts of the dispute, followed by a discussion of organising theory reflecting such challenges, but also considering traditional, recent legislative and technological organising challenges.

The wider context: global pandemic, mass job losses, and 'working from home'

The Covid-19 pandemic began December 2019, yet 23 March 2020 signalled the day the UK went into the first of several 'lockdowns'. While restrictions were eased in the summer of 2020, by autumn, due to a resurgence of Covid-19 cases, the UK went into a range of local then national lockdowns. Such a period involved so-called short-lived 'circuit breakers', followed by longer-term periods heavily restricting personal freedoms and employees, where possible, 'working from home',

From April 2020 the reality of closing or heavily restricting the operations of many UK industries began to unfold in terms of the potential for significant job losses and millions of workers placed on 'furlough', a government-sponsored job retention package involving employers putting some or all workers on temporary paid leave (e.g., see ACAS, 2021). Despite such a scheme, unemployment rose sharply, with the periods July-September and October-December associated with the highest rates of

redundancies (ONS, 2021). In broader terms, the UK's economy shrunk by 9.9% in 2020, the largest fall in 300 years, a shrinkage more than most comparative economies (Clark, 2021).

The industrial context: Covid-19 and higher education

Even without a pandemic and widespread large-scale redundancy programmes, all was not well in the higher education (HE) sector in the year 2020. In the months prior to start of lockdowns, the HE sector saw 22 days of strike action over pay, equalities, casualisation, workload and pensions. Further, in early 2018, HE staff also took 14 days of strike action. Over a wider timescale, HE staff reported excessive workloads (e.g., see UCU, 2016), issues further exacerbated by the pandemic, with higher levels of burnout reported at such times (Flaherty, 2020).

Between March and September 2020 the UK HE sector saw more than 3,000 redundancies, largely based on non-renewal of fixed-term contracts and significant cuts in temporary staff expenditure (McKie, 2020). A more recent assessment found more than 12 universities (including the case in question) had run or were about to run a redundancy programme, leading national UCU to accuse UK universities of 'exploiting' the pandemic to make wider savings or covertly push through hidden agendas (McKie, 2021). As such, the job prospects for HE staff losing their jobs during the pandemic, especially in the first year, appeared slim.

Specifically, from April until the summer of 2020, UK universities closed as physical places for both staff and students. While many universities began to re-open campuses during the summer of 2020, a range of restrictions led to a majority of staff working from home, as well as students studying in a remote fashion. Indeed, the academic year that started September/October 2020 involved universities adopting 'blended learning', a style requiring staff to support and variously deliver teaching through combining online and traditional forms of teaching. However, by circa November 2020 until the spring of 2021, universities were largely physically closed again, delivering only a very limited amount of face-to-face teaching and campus-based research during such times.

The local context: large scale redundancies and resistance at a UK university

As noted already, the pandemic had been a very testing time for staff across the HE sector, a time noted for unresolved long-running sectoral-wide conflict, unprecedented job insecurity and adaption to new ways of delivering learning and teaching. Regarding the specifics of the case in question, from the onset of the pandemic, branch organisers were having bi-monthly on-line meetings with equivalent employer representatives, based on crisis management, health and safety, staff well-being,

and furlough/wider job retention plans. However, an increasingly common part of the agenda was the sizeable impact of the pandemic on the employer's finances, signalling from April onwards the possibility of a large-scale redundancy programme.

In wider terms, the campus was closed for several months at the start of the pandemic, but began to re-open towards the end of the summer of 2020, the time at which the dispute started. By the time the dispute was resolved (early-mid November 2020) until the spring of 2021, the campus was largely closed, with staff expected to deliver only critical forms of teaching, pastoral care and research on campus. As such, for many months before and after the dispute ended, members and organisers were close on 100% working from home, an expectation far exceeding wider trends in homeworking during the pandemic (e.g., see ONS, 2020). Importantly, while many members pre-Covid-19 practiced intermittent homeworking, the working practices imposed post-April 2020 were sudden, enduring and without precedence.

The dispute officially began when the employer submitted 'Form HR1' (11 August), a legal requirement involving notification to the UK government of potential redundancies (see GOV.UK, 2020). The intended programme of redundancies was one of the largest in the sector since the pandemic began, with the employer citing a significant reduction in income to justify widescale job losses. Whilst the employer intended for the redundancy programme to seek volunteers, it reserved the right to resort to compulsory redundancies if savings targets were not met. Form HR1 also signalled 45 days of formal consultation with campus unions (see GOV.UK, undated). Key issues to note at this stage of the dispute included how prior informal consultations indicated around 80 job losses, yet HR1 Form stated 130, or a loss of 6% of the workforce. Second, formal consultations indicated redundancies would come from a minority of academic and related areas, suggesting certain areas of membership would be disproportionately affected, whilst others would not be affected at all. Thirdly and linked to both previous points, the likelihood of compulsory redundancies was clear, given the employer expressed preference for high numbers of job losses in specific areas.

UCU declared a formal dispute citing national policy opposing compulsory job losses (UCU, 2013), triggering the employer's dispute resolution procedures. However, when the first crop of dispute resolution meetings indicated an employer unwilling to withdraw threats of compulsory redundancies (early-mid September), UCU declared an intention to ballot members on industrial action. At that point, UCU ran a week-long consultative ballot (7-13 September), a ballot indicating 87% of members were willing to take industrial action based on a 44% turnout. In both ballots, UCU cited a range of grievances, including the devastating effect on members and their families, loss of institutional

reputation, and further increases to staff workloads. Despite unions playing a key role in influencing the UK government to take unprecedented action in protecting many millions of employees from redundancy (Hunt, 2021), unions remained tethered by the UK's highly restrictive employment laws, in particular the Trade Union Act 2016 (the Act), requiring member turnout in statutory ballots to exceed 50%. Whilst the consultative ballot result indicated exceeding the Act's voting threshold was possible, the statutory version required members to cast their vote via post, a more inconvenient methods than email. UCU faced several further dilemmas. Firstly, many members used work addresses (at that time inaccessible) to receive union postal mail. Secondly, the UK mail system was disrupted by the pandemic. Third, even if a mandate for industrial action was achieved, it was far from clear how picketing and industrial action would work out with everyone working from home. In contrast, while the branch had three times exceeded the voting thresholds of the Act, organisers had no experience of mobilising members in such unusual and unique times.

Theorising union responses: Traditional challenges, anti-union legislation and new technology

Regardless of pandemics, a central tenet of trade unionism is organising and then mobilising members against shared grievances, a situation achievable where unions organise to cultivate high levels of group cohesion and identity (Kelly, 1998). However, it is important to distinguish between mobilising and organising (Holgate at al., 2018). For example, Holgate et al. (2018) conceptualise 'mobilising' as exploiting resources of power already available to the union, such as sections of the membership deemed 'ready to go' in critical situations. However, 'organising' or 'deep organising' concerns assessing the wider power base in critical situations, via a range of largely traditional organising practices, to convince non-active members there is merit in identifying with union objectives. A further distinction is organising depends on grassroots leadership, a skill based around collective organising (Holgate et al., 2018).

The organising literature appears united in viewing leadership as critical in building group cohesion and collective identity. Simms and Deans (2015), for instance, found the goal of acquiring a collective identity involves not only organising members; it requires organising other groups important to the campaign. Such practice also involves simple/practical steps and characterised by organisers creating frequent/wider opportunities for members to discuss issues affecting them (Badigannavar and Kelly, 2005) and participate in the union (Johnson and Jarley, 2004). Ideally, such steps should involve building accessible resources and a density of mechanisms members can connect with fellow members, local activists and organisers, plus the wider union (Lévesque and Murray, 2013). Further research theorises organising based on framing grievances, largely taking the form of key provocative

messages to members in critical situations. Broadly speaking, this involves organisers developing ways to convince members to view the union as the in-group and the employer as the out-group (Burchielli et al., 2008). This can be done in a range of ways, including attempts to convince members the union is key to achieving collective objectives (Buttigieg et al, 2008), creating narratives based on shared values (Lévesque and Murray, 2013), and appropriating management discourses to create negative and out-group associations with employers (Rothstein, online early). Central to such organising, however, is organisers working with members to create a vision for change (Cregan et al, 2009).

Intersecting with pandemic-related challenges, UK unions face a further major challenge with mandatory minimum turnout rules in statutory ballots. Organising research related to such legislation has been limited so far. Porter et al. (2017), for example, foresaw servicing unions struggling under the Act. Darlington and Dobson (2015), moreover, predicted unions would also find voting thresholds hard to surmount where disputes involve multiple employers, disparate groups of members, and where recent calls for action have been half-hearted. In contrast, Gall and Kirk (2018) assert how good practice in such situations should begin with a consultative/indicative ballot, a means to test if members have deep and broad affinity with the union's definition of a grievance or grievances. Further good practice involves organising ballots on issues that really matter to members (Gall, 2017) and where there are sufficient organisers to carry arguments and mobilise members (Darlington and Dobson, 2015). Perhaps the most significant contribution to theory under the Act involves the development of a GTVO-specific organising model, a model based on strategic understandings of information, communication and the nature of contemporary employment and workplaces (Richards and Ellis, forthcoming). The model advocates organisers strategically reminding and encouraging members to vote, principally because a critical percentage of the membership where the model was developed (HE) was characterised by strong vocational identities and typically too busy/distracted to be widely mobilised without practices designed to cut through such occupational identities and realities. Importantly, the model also depends on organisers developing techniques to measure turnout rates at all stages of the campaign, or ways and means to be certain communications have broad and deep resonance with members.

Given a key contextual aspect of the dispute is members and organisers working from home, this leads to a discussion of new technology, as new technology represents the only means to run an effective GTVO campaign in such situations. Technology-driven organising has evolved and proliferated to exploit ever-emergent and evolving Internet-based technologies, such as the broad evolution of such technologies from static web sites and emails (Web 1.0) to social networking platforms and social media (Web 2.0) (Murugesan, 2009). Initial technology-driven organising research found, for example, how Internet technology is critical in members receiving union information (Richards, 2012), typically

through unions making information available via web-sites and emailing lists (Martinez-Lucio, 2003). In organising terms, what is critical to note is how such technologies bridge a gap between an increasingly heterogenous and individualistic workforce and the collective actions and solidarity associated with union organising (Diamond and Freeman, 2002). Web 1.0 studies reveal further organising value in email. For instance, Pliskin et al. (1997) found commonly available forms of communication technologies, such as email, are critical in bonding organisers and members together during long-running disputes. Web 2.0 organising researchers, however, are not dismissive of Web 1.0 technologies; rather, they advocate the view of Web 2.0 technologies complementing and overlaying Web 1.0 equivalents (Wood et al, 2015). Importantly, while some research indicates social media-based organising at the highest level of unions is typically conservative/superficial (e.g., see Hodder and Houghton, 2015), other research suggests otherwise. Indeed, lower-level organisers have successfully used new technologies to organise members in a wider-range of challenging contexts. For example, using social media to increase visibility of the union (Hennebert et al., online early), forge links between lay organisers (McBride and Stirling, 2015), and increase interactivity with members (Hodder and Houghton, 2020). Overall, while the most recent research focuses on union uses for social media, good technology-driven organising practices are probably best considered in terms of density of communications; that is, unions can expand their power base when communicating with members in many and varied ways (Wood et al., 2015).

Overall, there appears to be sufficient organising theory to cover the wider and more specific challenges faced by the union in mounting a successful GTVO campaign under restrictive statutory ballot legislation, during a pandemic. However, it seems likely such theory will be tested to its limits when applied in the context of the current study.

Methodology

Case study approach

The research is based on a single case study, involving an exploration of a 'bounded system' over a period of approximately three months, through detailed, in-depth data collection involving multiple sources of information in context (Creswell, 1998). The bounded system involves activities of a campaign team and members eligible to vote in a statutory ballot for industrial action. To capture insights to the campaign, multiple sources of information are drawn upon, with data coming from interviews with the campaign team (see Table 1) and specific responses from a survey of ballot eligible members. The general approach was deemed appropriate, as it has been used many times to test and

develop organising theories (e.g., see Lopes and Hall, 2015; Simms and Deans, 2015; Rothstein, online early).

Ethics, methods, sampling and participant recruitment

The local union committee supported the study and full ethical approval was granted by the lead author's institution. Data was collected March-June 2021 exclusively via electronic methods, due to ongoing government expectations for employees to work from home wherever possible. Interviews with campaign team members (see Table 1) were conducted March 2020, via the Microsoft Teams communication platform. Such interviews were designed around answering the first research question. Interviewees were recruited by the paper's first author; the second paper's author conducted the interviews. The survey was aimed at addressing the second research question and designed around key themes from the literature and research interviews. A convenience sampling approach was taken, in that respondents were recruited based on those most available and willing to take part (Saumure and Given, 2006), although recruitment messages variously encouraged participation regardless of member attitude to the dispute and associated campaign. The survey ran 12 May to 9 June (4 weeks). Participants were recruited via four emails, all written via the lead author, and sent out via the branch's closed membership emailing list.

Team role/information	Main role details	Interview date	Interview (minutes)
Branch Administrator	Develop/co-manage master spreadsheet and organise replacement ballot papers	24 March 2021	63
GTVO Organiser 1	Devised original GTVO-specific organising model and led on framing emails to members	31 March 2021	77
GTVO Organiser 2	Co-managed master spreadsheet and led on semi-automatic method of organising members	23 March 2021	90
Branch Development Organiser	Full-time official overseeing branch plans, plus support for organising mid-campaign rally and ThruText method of organising members	30 March 2021	63

Table 1: GTVO campaign team, main roles and interview details

Research design

Interviews were variously structured, but followed a global theme of leadership/organising. A range of organising interventions were drawn upon, including attaining widespread member involvement, leadership, and GTVO-specialised and technology-driven organising. The approach captured personal insights, experiences and leadership regarding organising. A common thematic line of enquiry cut

across all interviews, for example, prior experience, responsibilities, milestones/events, effort/time involved, and, what worked well/less well. Some questioning was tailored according to the role (see Table 1). For instance, the Branch Administrator was questioned about managing key membership data; GTVO Organiser 1 was invited to elaborate on framing grievances, GTVO Organiser 2 was asked to provide details of technology-assisted organising, and the Branch Development Organiser was queried specifically broad about approaches to GTVO campaigning, e-rallies and specialised technology-driven organising.

The survey was designed to captured three sets of information – demographics, union and employment details. Analysis of such data adds transparency to the findings, plus allows comparisons between the sample and wider membership. Beyond an optional open-ended question allowing further views on organising, one question streamed participants through the survey based on the requirement of members to self-identify as: 1) non-voters – members the campaign failed to organise; 2) pre-mobilised voters – already activated members; or 3) campaign-organised voters – non-active members until organised during the campaign. However, only organised voters were invited to respond to seven additional Likert-scale questions (very important to very unimportant), questions based on organising interventions drawn from the literature and interviews: framing, reminders/encouragement to vote, trust in organisers, density/variety of communications, minimum voting thresholds, tone of messages, attempts to measure voting/turnout rates (see Figure 2).

Data analysis and sample details

Thematic analysis was used to make full sense of the qualitative data, capturing patterns within and across datasets (Braun et al., 2019). The use of thematic analysis is apt as it involves coding qualitative datasets based on interventions deriving from theory/literature/primary research (see above); a further strength is an allowance for emergent themes, expected from such an unusual study. Descriptive statistical analysis was used to explore the quantitative data (Jupp, 2006), because more advanced forms of analysis seemed superfluous to requirements. In this instance, it was deemed more than sufficient to convert raw data into, for example, a single bar chart (see Figure 2) to allow analysis of such data.

One hundred and two members were initially drawn to the survey. Two of these did not meet requirements of the study and 5 did not complete the survey. In total, 95 members took part, representing 23.6% of the membership. As can be seen by viewing Table 2, a table in the first instance comparing survey participation and membership percentages, indicates how women and open-ended contracted members are over-represented in the sample. In contrast, men, members on fixed-term

and casualised contracts are under-represented. A total of 27 usable open comments were collected, or 889 words of qualitative data. Importantly, Table 2 provides details of how members self-identify in terms of their response, or lack of response, to the campaign. There is no pre-dispute information to compare this aspect of the survey sample with, but it seems safe to say non-voters are under-represented in the survey. Further, given the extensive efforts of the union to organise members during the GTVO campaign, it seems reasonable to suggest pre-mobilised members are over-represented and organised members are under-represented in the sample.

Sample	Respondents (%)	Membership (%)	Votes cast (%)
Sex			
Women	47.5	41.3	Not known
Men	52.5	58.7	
Contract of employment			
Full-time	80.0	81.1	Not known
Part-time	18.9	13.0	
Prefer not to say	1.1	5.9	
Employment status			
Open-ended	90.4	79.1	Not known
Fixed-term	6.0	16.5	
Casualised	1.2	4.4	
Prefer not to say	2.4	0.0	
Self-identification of member for ballot			
Non-voters	9.5	2.3	6.6
Pre-mobilised	64.2	15.1	22.7
Organised	26.3	6.2	9.4

Table 2: Details of survey sample

Limitations

Overall, the methodology is robust, particularly in acquiring extensive, novel and insider information from the organising team, but the survey has a range of limitations. The survey attracted just under a quarter of those eligible to vote and just over a third who did. It seems reasonable to assume the survey response rate may have been affected by a combination of high workload pressures and pandemic-related burnout (UCU, 2016; Flaherty, 2020). The survey was also conducted at a time when many academic and related staff are marking and administrating the taught elements of under-graduate and post-graduate degree programmes. In wider terms however, the response rate sits approximately one standard deviation below the mean response rate from surveys conducted in the education sector (Baruch and Holtom, 2008). Further, the sample representativeness is good, a key compensatory factor where response rates fall below expectations (Cook et al., 2000).

Findings

The statutory ballot ran for three weeks, 28 September to 20 October, and achieved a turnout of 66.1%, with 77% supporting strike action and 88% supporting action short of striking. Following the result, the union announced plans for industrial action (6 days of strike action from 10 November, plus for example, working contracted hours), but dispute resolution meetings ran up until the days before industrial action was set to begin. In the days before the industrial action was set to begin the employer withdrew the threat of compulsory redundancies for the foreseeable future. The decision was consolidated in a collective agreement. What follows is a 'behind the scenes' analysis and discussion of the campaign that substantially strengthened the hands of the lay and full-time union officials in achieving the collective agreement. Such findings are divided between five key facets to the GTVO campaign – administration/team planning and creation of a 'master' spreadsheet, semi-automated organising, framing grievances, density of mechanisms and communications, and maximising turnout through personalised organising (see Figure 1 – key to visualising the full campaign), followed by an analysis of members organised during the campaign via seven pre-identified organising interventions.

Campaign team's perspective on the GTVO campaign

Administrative work (19 August) began with GTVO Organiser 2 informing the Branch Administrator of an impending statutory ballot. Subsequently, the Branch Administrator emailed members on long-term leave asking for status updates, allowing ballot ineligible data to be refreshed. Based on direction from GTVO Organiser 2, the Branch Administrator contacted UCU headquarters (early September) requesting a version of their ballot eligible list, a list subsequently compared and corrected using the branch's developing spreadsheet. Following such steps, GTVO Organiser 2 emailed all members (23 September) confirming the dates of the ballot window, but also requesting members check/adjust personal postal addresses through the on-line membership portal. At this time, the team responsible for leading on ballot maximisation (25 September), effectively a steering group, met on-line to allow the Branch Administrator to brief the wider team and for the team to decide and plan next steps and divide up key tasks. Specific next steps for the Branch Administrator involved checking 'out of office' email replies for members who had not previously declared ballot-disqualifying circumstances (25 September), and contacting members known to have a work address as their balloting address. Once the ballot started, the Branch Administrator shared a 'master' spreadsheet (see Figure 1) of ballot eligible members with GTVO organisers (30 September), a spreadsheet detailing names, schools/services, email addresses, and mobile phone numbers if provided (approximately one-third of members registered a mobile phone number with the union). In effect, a spreadsheet initially

assembled for statutory reasons, switched and became the basis of all GTVO organising. Crucially, the spreadsheet would not exist simply to help 'carrying arguments' (Darlington and Dobson, 2015); it would be critical in planning the campaign itself, specifically supporting attempts to measure on an ongoing basis the effects of campaign organising on member mobilisation (Richards and Ellis, forthcoming).

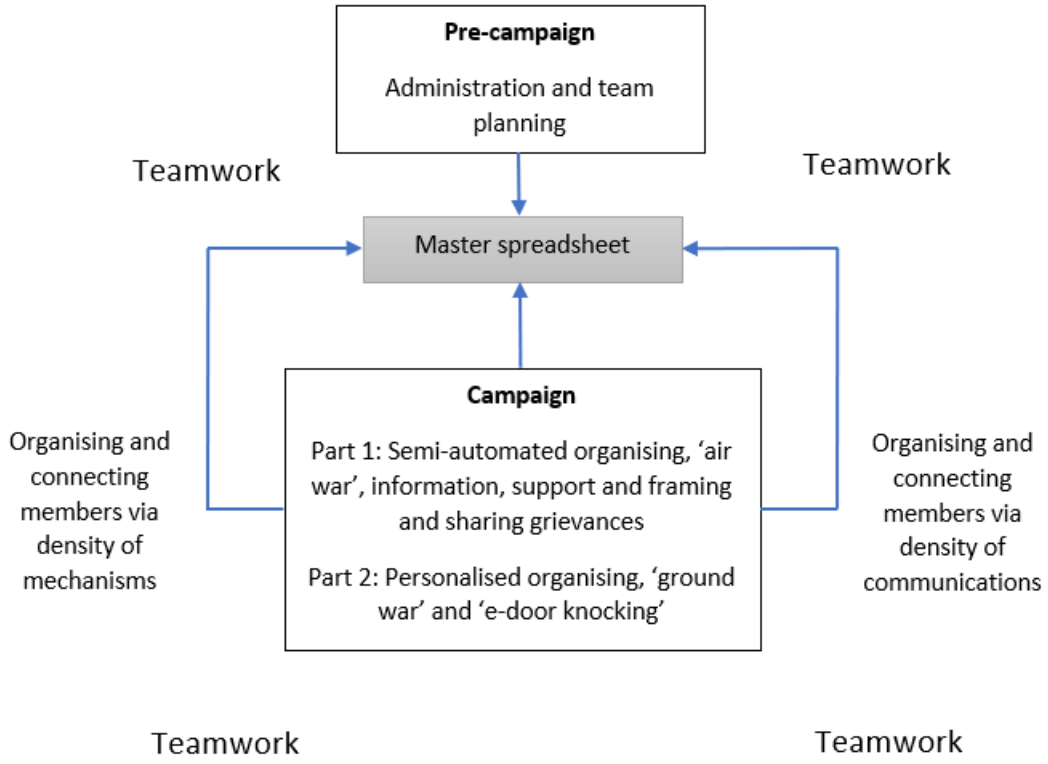

Figure 1: GTVO plan and campaign

The Branch Development Organiser saw the first part of campaign as an 'air war' (see Figure 1), where organisers communicated messages to members in a largely indiscriminatory manner. Such a task was undertaken in one sense by GTVO Organiser 2, demonstrating grassroots leadership (Holgate et al., 2018) by using SurveyMonkey, an electronic survey platform, to organise members, but at the same time collect critical information on the level of member mobilisation during the ballot window. GTVO Organiser 2 previously used SurveyMonkey in a similar campaign (late 2019), but this time in a 'more and more systematic' manner, effectively introducing a form of semi-automated organising (see Figure 1), but also designed to strategically remind all members to vote from the onset (Richards and Ellis, forthcoming). In short, the platform was set to send individual emails (5 October) containing short and factual campaign updates, but most important of all allowed members to: easily report

receiving no ballot paper, signal the awaiting of a replacement ballot paper, or confirming casting of vote. Where members declared having voted, this information was added to the master spreadsheet, a spreadsheet available to the wider team. Further, when members declared problems receiving a ballot paper, they were supported to get a replacement, when members declared they had not voted, they were sent up to two further/similar messages (8 and 12 October). GTVO Organiser 2, however, divulged further information regarding semi-automated organising, including how information regarding new members provided by the Branch Administrator could easily be added to the system. Secondly, a small minority of members had previously blocked receiving survey participant requests from SurveyMonkey, so in this instance, GTVO Organiser 2 contacted such members, directly via email, providing the same information and posing the same options. Thirdly, GTVO Organiser 2 recommended the semi-automatic process should be used sparingly (up to three contact messages), with non-voters from that point organised in a more personal manner (see later in sub-section). The day after the third message went out (13 October), the master spreadsheets indicated 49% had voted and approaching 50 members (12% of membership) were being supported in attaining a replacement ballot paper (requests channelled via the Branch Administrator).

While semi-automatic organising made for a successful start to the air war part of the campaign, such campaigning also involved a parallel and different form of organising and grassroots leadership (Holgate et al., 2018), where web 1.0 and 2.0 technologies were applied concurrently (Wood et al., 2015), a form of organising based on framing and sharing grievances with members, with the express aim of cultivating a collective identity (Kelly, 1998) (see Figure 1). In this instance, GTVO Organiser 1 sent out seven emails (five during the three-week ballot window, plus one prior and post-ballot window) presented on the one hand as factual and supportive, but on the other, with the express intention of rallying the full membership into action (see Table 3). During interviews, both branch organisers highlighted their sense of importance in members hearing from different organisers, in effect, collectively striking a balanced tone in communications with members. However, both such organisers also believed successful GTVO campaigns are built on members having high-levels of trust in the union, that is unless grievances are framed accurately, fairly and with a semblance of balance, members could lose or fail to gain trust in the union, thus not connecting or disconnecting from the campaign. Aided by archived emails (see Figure 2), GTVO Organiser 2 summarised attempts to provoke and activate members, but also to sustain and build trust in the GTVO campaign.

As demonstrated in Table 3, GTVO Organiser 2's communications, despite delivered in an electronic in format, link closely with organising theory. For instance, keep members and organisers united during a dispute (Pliskin et al., 1997) (all emails), frame the employer as the out-group to maintain unity (Burchielli et al., 2008) (emails 1, 2, 4), and convince members the union is key to achieving share

objectives (Buttigieg et al, 2008) (emails 1, 4, 6). Further, the approach to organising involved appropriating management discourse surrounding the dispute (Rothstein, online early) (emails 2, 3), but at the same time offering a vision for change (Cregan et al., 2009) (email 6), based on shared values (Lévesque and Murray, 2013) (emails 5, 7). Ultimately however, without a system designed to provide a steady stream of data based on member mobilisation, the team would be left guessing if campaign leadership and associated practices delivered on member unity and trust.

Date of email	Stage	Framing subject
27 September	Pre-campaign	Union forced into a ballot because of the attitude and behaviour of the employer
29 September	Campaign	Uncertainty of how employer will act on day the voluntary redundancy scheme closed
4 October	Campaign	Certain areas remain at risk of compulsory redundancy despite employer portraying voluntary scheme as a success
9 October	Campaign	Provision of a link to union YouTube video [5 minutes and viewed 200 plus times during the campaign] attributing blame on the employer, but making it clear how a strong mandate for industrial action represents the best chance of a negotiated end to the dispute
11 October	Campaign	A personal anecdote about doing academic work at the weekend, during a pandemic, to free up time for union activities during the week, i.e., a call for members to reciprocate efforts of the union
18 October	Campaign	Details of a union counter proposal to resolve the dispute, further implying member reciprocation and unity
20 October	Post-campaign	Thanking all playing a part in the resounding result, but emphasising role of members and collectivism in success

Table 3: Framing grievances and organising via all-member emails

Alongside activities discussed previously, including a consultative ballot (Gall and Kirk, 2018) planned by the Branch Development Organiser, the team and wider union organised to increase interactivity with members is a range of other ways (Hodder and Houghton, 2020). Such practices aligned with the mobilising intentions of the campaign and involved substantial input from both GTVO organisers and the Branch Development Organiser. Indeed, interviews drew out the full range/density of mechanisms (Lévesque and Murray, 2013) and communications (Wood et al., 2015) used to organise member involvement in the union (Johnson and Jarley, 2004), during the campaign, but also to consolidate unity post-campaign (see Figure 1). For instance, the union held two emergency general meetings (EGMs) before the ballot (detailing employer redundancy plans, and proposing a statutory ballot) and two after (discuss/vote on industrial action plans, and vote on agreement to end dispute). All EGMs were held off the employer's main video conferencing system (Teams), using Zoom so members felt comfortable in a non-employer space. Two on-line rallies were used to organise members, one mid-ballot (organised by a key figure on wider branch committee, with the technological side of such plans

put in place by the Branch Development Organiser via StreamYard (a live streaming studio) and broadcast via Facebook and YouTube), and one initially organised to mark the first day of industrial action, but became a celebration of the union's achievements (organised via Zoom and by UCU Branch Solidarity Network). Both EGMs and rallies attracted substantially higher attendance and activity compared to pre-Covid-19 times. Importantly, the rallies involved organising other groups important to the campaign (Simms and Deans, 2015), serving to increase the visibility of the union (Hennebert et al., online early), and forge links between organisers (McBride and Stirling, 2015). Indeed, rallies involved speakers drawn from politicians of all persuasions, national UCU leadership, wider branch organisers, the Scottish Trades Union Congress, and high-profile alumni. Further, Web 2.0 organising involved a branch Facebook page (approximately 280 members) used to inform and provoke members (11 campaign messages), and Twitter (approximately 1200 followers) was similarly used, with 85 dispute-related tweets and 89 re-tweets issued from the submission of Form HR1 through to the day of the final rally.

The final key interview theme involved a strategic effort in the last week or so of the campaign to maximise turnout via more personalised efforts of organisers (Richards and Ellis, forthcoming). This part of the campaign was referred by the Branch Development Organiser as the 'ground war', akin to 'door knocking' performed by party workers the days before political elections (see Figure 1). The approach followed the semi-automatic organising system, and involved two further ways to make every vote count, a strategy estimated to have added 15 crucial percentage points to the final tally. First, the master spreadsheet was shared between five organisers (two from the team and three from the wider committee), with each organiser given the task of directly contacting (effectively a form of 'e-door knocking') approximately 40 non-voting members. Each organiser broadly followed the SurveyMonkey approach, but in this instance, organisers contacted such members in a manner suiting each individual organiser, and when someone had voted or required a new ballot paper, this information was fed, via email, to keepers of the master spreadsheet, and acted upon where a replacement ballot paper was required. This approach proved very successful as GTVO Organiser 1, established through various organising conversations (including email, plus personal messages through LinkedIn, Facebook and Teams), 15 members had voted, adding 3.7 percentage points to the final tally). Second, the Branch Development Organiser used ThruText, a large-scale peer-to-peer texting tool (approximately 70 non-voters were contacted this way), to convince/remind 10 members to vote, adding a further critical 2.5 percentage points to the final tally.

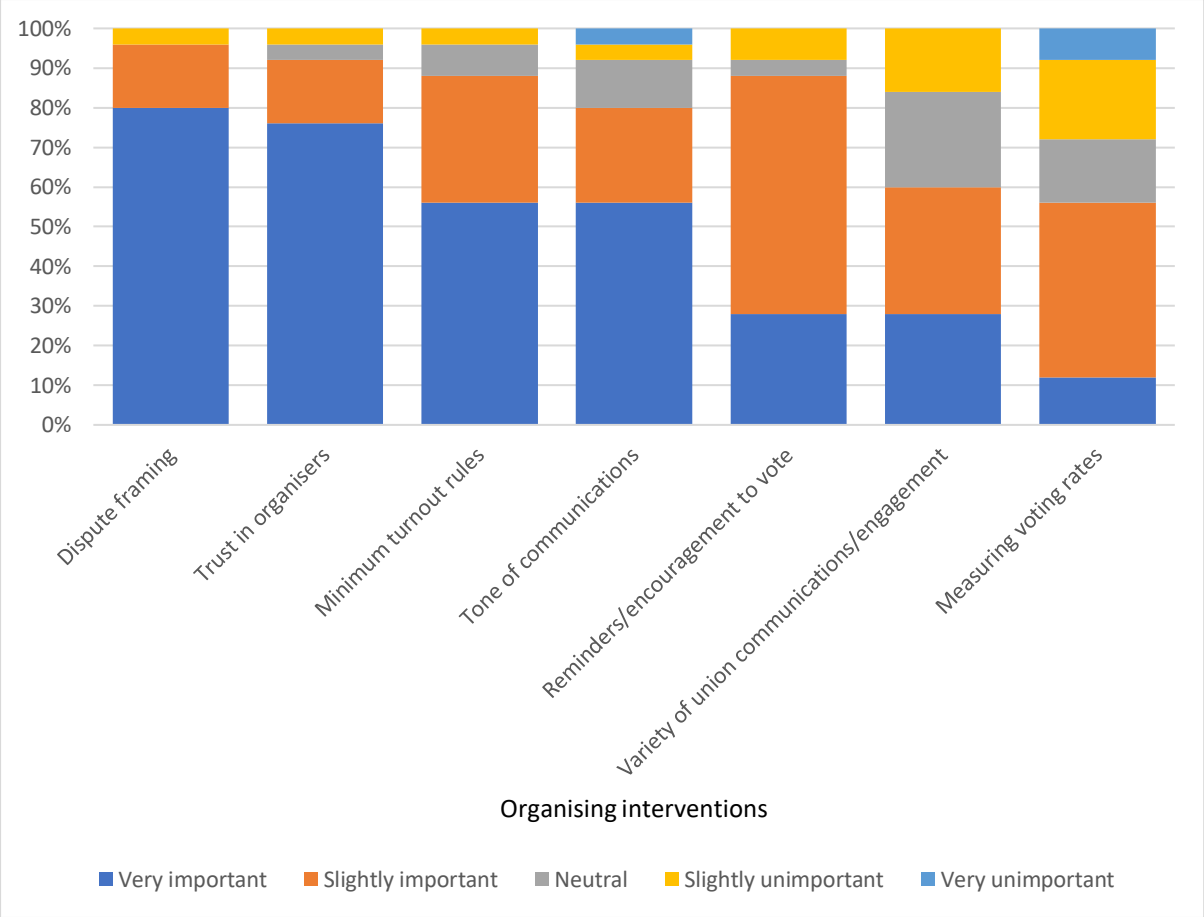

Figure 2: Member attributions of importance to organising interventions

How to extend the union power base: A member perspective

By the final Friday of the ballot (16 October) the master spreadsheet indicated 59% of members had voted, with the team sensing a final turnout of 60% plus. However, while the team acknowledged there was plenty of power in the union pre-campaign (Holgate et al., 2018), they sensed their efforts had extended that base to a point where voting threshold requirements of the Act had been comfortably exceeded. While important lessons can be taken from an organiser perspective, further and finer lessons can no doubt be taken from those organised and mobilised by such practices. As such, part two of the findings discusses member perspectives on how the union extended its power base during the dispute. This involves two stages – a general and deeper analysis of the organising interventions depicted in Figure 2.

While on the surface Figure 2 depicts member attribution to a range of pre-identified organising interventions, what it also shows is a nuanced side to expanding union power (Holgate et al., 2018) in hostile and uniquely challenging circumstances. Indeed, when considering the full range of

information, it seems reasonable to assert how GTVO campaigning should not be seen as a range of individual tasks, but as a collection or set or priorities for union organising teams. Specifically, all interventions were viewed as at least slightly important by a majority of organised members. Despite indicating success based on seven organising interventions, five of those interventions (framing, trust, minimum turnout, tone, reminders/encouragement) appear more important than the other two (variety of communications and measuring turnout). However, two of the interventions (framing and trust) stand out in terms of most importance to members not-organised at the onset of the campaign. In contrast, such members attributed least, but significant importance to the many ways they received information or interacted with the union, as well as the union strategy of measuring the percentage of members mobilised during the campaign. In qualitative terms, one organised member quote, seems to epitomise the wider findings:

> It was good to get clear explanations from the branch. This enabled me to speak to colleagues i.e. use word of mouth. I felt informed and able to use the appropriate language with others. This feeling of being in a shared conversation motivated me to vote and also encourage others to consider voting. The tone was very good, not panicked or threatening but calm and measured. It made me feel in that I was taking control and being supportive of the institution.

In this instance, the quote demonstrates how campaign organising created the conditions members could discuss issues affecting them (Badigannavar and Kelly, 2005). However, the quote further highlights how a package of organising (see Figure 1) is required to mobilise a critical, but agnostic section of the membership, but at the same time exemplifying how it is possible to overcome so many contemporary and emergent challenges.

Figure 2 shows members were not mobilised by accident, nor as a result of taking union members for granted. For instance, Figure 2 represents far more than the union passing information to members via Internet-based technologies (Martinez-Lucio, 2003; Richards, 2012). What it does capture is a union applying existing organising experience and expertise, as well as careful strategic planning reflecting new and unexpected challenges, plus innovative use of both Web 1.0 and 2.0 communication technologies (Murugesan, 2009), to build bridges in a pandemic, with dispersed members, resulting in a powerful appetite for collective action and solidarity (Diamond and Freeman, 2002). Moreover, while the union picked an issue of importance (Gall, 2017), the campaign approach did not detract from what was also important to members during such times. Put differently, while it is clear the call for action was far from half-hearted (Darlington and Dobson, 2015), Figure 2 is evidence of members heeding repeated, refreshed, re-invented and re-contextualised union messages. Importantly, the union made a critical call at the start of the campaign – despite calling a dispute on a critical issue, it rightly assumed it did not have enough resources of power to win the dispute and would need to further organise to overcome key limitations (Holgate et al., 2018). Figure 2 represents

in fine detail the various levels of importance members put in various ways the union went about trying to make itself the 'in-group' during the dispute (Burchielli et al., 2008). Indeed, member comments exemplify such sentiments. For example, the following quote, not only demonstrates the importance of framing the employer as the out-group, but how framing in such circumstances must reflect wider challenges faced by members. Specifically, the quote captures a member recognising how the union used an understanding of the wider context to the dispute (Richards and Ellis, forthcoming) to expand member power:

> … Clear summaries of what's at stake and reminders to vote are invaluable, as some of us are too busy to research what exactly is going on.

A further quote demonstrates how group cohesion and identity (Kelly, 1998) can be built and maintained in the case of a widely dispersed membership, in the middle of a pandemic. Below, an inactive member recalls becoming active, and at the same time assuming a collective identity:

> I wanted to help reach the minimum turnout for good of colleagues more invested in the dispute.

Importantly, the quote not only shows the successful mobilisation of a critical part of the membership, it demonstrates how in such situations members can come to build awareness of and invest in wider union challenges.

What the findings in Figure 2 appear to show most of all, however, is the criticality of, and possibilities for, technology in acute and complex situations. Indeed, Figure 2 and the overall ballot result appear to demonstrate how members respond positively to technology-driven organising. Not only that, the union did not just collectivise its members, it collectivised a range of technologies at the same time (see Figure 1). As noted earlier, this also involved a team approach to the strategic exploitation of spreadsheets, survey platforms, email, video conferencing, social networking platforms, live streaming, and peer-to-peer texting tools. Again, this did not happen by accident or by taking anything for granted. Indeed, while Figure 2 represents member value placed in effective grassroots leadership (Holgate et al., 2018), it also shines a spotlight on how members value grassroots leadership based on teamworking and the strategic exploitation of available/emergent technologies. Specifically, far from taking a conservative/superficial approach to organising via new communication technologies (e.g., Hodder and Houghton, 2015), the union not only built a density of mechanisms (Lévesque and Murray, 2013) and communications (Wood et al., 2015) to connect members with the wider union and beyond (Simms and Deans, 2015), the findings from Figure 2 suggest many members not only responded positively to a collection of organising activities, such members also responded positively, directly and indirectly, to collections of technologies and mechanisms designed to keep them informed and active during a dispute (see Figure 1).

Conclusions

The aim of the research was to extend organising theory and practice, through the analysis of a single case study, where the union and members faced a compulsory redundancy situation, made extra difficult and complex because of three key challenges: a pandemic causing widespread anxiety and fear, a workforce highly dispersed due to work from home orders/recommendations, and recent legislation designed to make it harder to achieve a mandate for industrial action. The paper comes to an end by reflecting on the research questions, contributions, limitations and future research.

Research questions

The findings drawn from the campaign team clearly suggest an effective campaign for industrial action, during such prohibitive circumstances, requires many approaches to organising (see Figure 1). Key approaches to organising in such situations appears dependent first of all on building a shared spreadsheet of key member information/planning the campaign, and then putting the campaign into action via a range of organising practices designed to generate data that is fed back to the master spreadsheet. However, while on the surface of it, organising appeared key to campaign achievements, effective organising was made possible because of a meticulous administration process, including a means by which critical data/information could be shared and used by the wider team. A second key lesson involves the importance of having a small team, effectively a steering group, dedicated to running the campaign, and having substantial autonomy to plan, divide up and own key tasks, take on new tasks as the campaign progressed, and able to call on wider support when needed. Importantly, the skills required of such a team includes administration, familiarity with a range of traditional and emergent communication technologies, and previous experience organising a campaign. Further attributes of such a team include a willingness of team members to lead and be led, work flexibly throughout the campaign, and solve problems where necessary.

The findings drawn from members provide specific, but more nuanced insights into the organising processes associated with campaigns for industrial action. For example, such findings provide evidence to suggest organising should not only be understood as based on interventions, interventions all having a traditional and technology-driven element, organising teams should consider all of those interventions, especially framing and building trust with members, when planning a GTVO campaign. Importantly, it is an understanding of the many interventions associated with organising, followed by building such an understanding into practice, that is likely to make the difference between a failed and successful campaign, or a moderately successful and a very successful one. As such, both sets of findings complement each other, as both variously point out how during a GTVO campaign, nothing

should be taken for granted, as well as how subsequent administration and organising need to align closely with the aims of the campaign. Importantly, however, the second set of findings provides insights beyond those of the campaign team. That is, while the organising team put in place a robust system designed to measure how much the membership had been mobilised at various and key junctures of the campaign, the findings from the survey allows team members the greatest opportunity to reflect on their practice.

Theoretical contributions

First, the study makes a clear, unequivocal and important empirical contribution. The study was set under very unusual circumstances, but those unusual circumstances were shared across the labour movement, with such circumstances unlikely to change much in the near future. As such a contribution is made in terms of surfacing an example of the important work done by unions during the pandemic, via insider accounts and hard to access research participants. Second, the findings broadly add to debates and the body of literature surrounding the many contemporary challenges faced by unions (e.g., Blyton and Jenkins, 2013; Rothstein, online early), and the smaller, but emergent growing body of literature considering the many pandemic-related challenges faced by unions (e.g., Hunt, 2021). Precisely, the findings represent a further, but unique and novel way of highlighting the continued relevance and importance of unions, especially in contexts where governments offer unions 'no quarter'. Third, the findings extend organising theory in three distinct ways. For example, extending notions of organising and mobilising (Holgate et al., 2018), as well as new ways to build worker unity and cohesion (Kelly, 1998). The findings extend the little theory specifically related to GTVO campaigns (e.g., Richards and Ellis, forthcoming), principally extending a prototype GTVO-specific model to include a complete reliance on technology-driven organising (see Figure 1). However, a further contribution to theories of technology-driven organising is made, one that is far beyond linking unions with technology (e.g., Richards, 2012). Importantly, the findings not only affirm how effective organising is built on unifying organisers and members via a density of mechanisms (Lévesque and Murray, 2013) and technologies (Wood et al., 2015), they provide evidence of how organisers need to collectivise such mechanisms and technologies at the same time as organising members.

Practical implications

In the broadest terms, the findings have practical value because even if the pandemic recedes, unions will continue to face a combination of old and new challenges, and technology-driven organising appears key in all such situations. Importantly, the research detailed how traditional forms and goals of organising could be replicated in the most challenging of circumstances. As such, a key practical

implication is how the findings not only further affirm union investment in technology-driven organising, the findings also point towards unions considering hybrid forms of organising, that is variously combining traditional and technology-driven practice. More specifically, aside from providing further evidence to challenge the relevance of servicing approaches to trade unionism post-Act (Porter et al., 2017), effective and sustainable GTVO-specific organising appears dependent on building member confidence and trust via a combination of organising based on leadership, planning, information/data management, technology and teamwork. As such, the findings suggest unions invest in emergent technologies to achieve more from statutory ballots, but also to take the strain out of what can be onerous practices. The findings also have practical implications where bargaining units link employers, draw on multiple and varied occupational groups, and unions have recently made weak cases for industrial action (Darlington and Dobson, 2015). While the research did not reflect such problems, a further practical implication is for unions lacking in GTVO-specific organising capacity to 'dis-aggregate' ballots across employers and occupational groups, but at the same time build small and autonomous organising teams or short-life steering groups, to deliver the strongest possible bargaining outcomes. Further down the line, successful organising teams and practices could be merged to build campaigns across employers and occupational groups. A final recommendation follows and extends the work of Gall (2017) and Gall and Kirk (2018), in 'picking battles carefully' and using consultative ballots to 'test the water'. Indeed, the research findings suggest unions should also pick battles based on having the right technology-driven organising in place, and merge overall plans for consultative and statutory ballots, as the technology and organising required in such instances appears to be converging.

Limitations and future research

The findings are likely to have less value and application where members are serviced rather than organised, where bargaining units are defined by multi-employer arrangements and a wide-range of occupational groups, and there has been little or no industrial action organised post-Act. To remedy such scenarios, more research is required to capture organising practice where a wider range of unions have already beaten the Act, but given limited industrial action since the advent of the Act, as well as the impact of the Covid-19 pandemic, it makes sense for unions new to or wary of organising ballots in such circumstances, to embed experienced researchers and organisers in such campaigns for industrial action.

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