

Organising to Win
Mapping and charting
your workplace



Workplace mapping is key to any successful organising activity. It enables us to target our efforts and resources for maximum impact.

Before a campaign it helps us understand our UNISON organisation, potential strengths and weaknesses, and existing power dynamics in a workplace or employer. All vital for effective planning. As campaigns progress, mapping allows us to monitor and evaluate levels of activity and support. All vital for successful campaign escalation. Finally mapping allows us to chart participation journeys from worker to member, to active member, to activism, and leadership. Ensuring we build activist development and sustainability into our campaign plans.

Whilst it may appear dry, or even bureaucratic, mapping is a vital tool in achieving our organising goal of shifting the balance of power towards UNISON members. Without it, we cannot Organise to Win.

General Data Protection Regulation (GDPR)

Most member data held by UNISON is defined as “personal” and using that data for mapping is “processing.” It is a myth that mapping is prohibited by GDPR. But mapping must adhere to the seven data protection principles outlined at the end of this guide. This guide will enable activist and organisers to map in a way that supports our legitimate interests to organise in pursuit of UNISON’s agreed goals, whilst protecting the individual rights of members and others regarding how their data is processed.

Activists and organisers must complete UNISON’s mandatory GDPR e-learning and familiarise themselves with the detail covered in the [GDPR Branch Guidance](#) prior to any mapping activity. Providing this guidance is followed, mapping can be undertaken by and shared with activists who have demonstrated an understanding that:

- Mapping should always be within the 4 levels outlined below and not include additional data unrelated to the aims of that specific map.
- Mapping must be stored securely. Digital copies must be password protected. Any physical copies must be securely stored in a locked cabinet. Mapping must not be circulated beyond the organisers and activists involved in the specific mapping and campaign activity.
- Mapping must not be held for longer than is necessary for its purpose. At the end of the organising campaign or activity, the map should be used to make any necessary updates to Warms / Merlin such as new workplace or contact details, and then deleted, or in the case of physical copies, shredded and disposed of in secure waste bins.
- Individuals have the right to make subject access requests to see all data held on them by UNISON. Therefore, mapping must not contain any information or opinion that you would not want shared with that individual or that could embarrass

UNISON.

Ensuring activists understand these key points is important as effective mapping is best undertaken collectively by organisers and activists at a workplace level.

UNISON's 4 stage approach to workplace mapping.

Mapping is time consuming and must only be undertaken for a “specific, explicit, and lawful purpose”. As such it is important to understand what depth of mapping is required for what purpose. To help, UNISON has devised 4 levels of workplace mapping:

Level 1 – Density and Activism Map

Purpose: To understand UNISON membership and activist levels by employer, and worksite, to inform base organising plans and objectives. Depending on the size of employer and the activity being planned, we may want to map by department, job groups, or shifts.

Data:

WARMS / Merlin: Membership numbers by employer, worksite etc.

WARMS / Merlin: Activist numbers by employer, worksite etc.

NB it is good practice to ensure employer DOCAS records have been recently processed to avoid out of date mapping.

Local knowledge: Some information such as shift patterns, is not stored on WARMS / Merlin. If important for the purpose of the mapping, such data would need to be collected through discussions with members, or the employer. For the purposes of L1 mapping, you only need to know how many members there are, not their names.

Staffing numbers: Having determined membership levels, you can add staffing numbers to see what proportion of staff are UNISON members (known as “membership density”). Staffing numbers can be requested from the employer or in many cases is publicly available in annual reports. E.g. NHS trust annual reports can be found online and usually distinguish between support, clinical, and medical staff. Similarly, council and university annual reports will usually provide staffing information by occupational group. This is important as it allows us to exclude occupational groups that UNISON does not seek to organise or represent e.g. doctors, teachers, lecturers, police officers etc.

In the L1 example below, schools with no known activists have been highlighted red. In this example, L1 mapping would continue until it covers every school in the multi academy trust to provide an illustration of UNISON organisation across different sites, so that activity can be targeted and planned accordingly.

Employer	Worksite	Members	Support Staff	Density	Activists
ABC Academy	School A	12	15	80%	2
ABC Academy	School B	10	30	33%	0
ABC Academy	School C	30	60	50%	1
ABC Academy	School D	7	25	28%	0

Level 2 – Base Organising Map

Purpose: Whereas the L1 map provides a snapshot to support planning, the L2 map is a living document to support activity to build and maintain a strong and functional union in the workplace and branch. L1 builds on L2 by adding individual member details.




Data:

WARMS / Merlin: Individual member details by employer, workplace, job can be downloaded from WARMS / Merlin as a CSV file (from the “Organisations” mailing category / Organising CSV report). As the UNISON rule book commits us to fair and proportional representation, it is also legitimate to add gender and / or ethnicity information providing it will be used to achieve the goal of increasing member participation from groups currently under-represented in UNISON activism and structures.

To ensure GDPR compliance, the report does not include all email and phone contact details as any bulk communications must be undertaken via Merlin bulk email and the Merlin “MCT” campaign function for phone contact. Where individual contact details are required for a specific purpose, e.g. for activists, and campaign contacts, these can be added for those specific individuals but must not be circulated beyond other relevant UNISON activists without the member’s explicit consent. Named non-member data must not be included unless consent has been obtained from the individual for their data to be used for that purpose e.g. through an explicitly worded consent on a survey or petition response and includes a mechanism by which those individuals can stop the processing of their personal data. E.g. survey data disclaimer - *All responses will be treated in confidence. If you are a UNISON member you are agreeing for UNISON to use this information to update your contact details. Please note (members and non-members) by completing this survey you are agreeing for UNISON to store / use this information and to contact you for the duration of the (insert name of campaign) at (insert employer or workplace). You can withdraw your consent for your data to be held and processed at any time by contacting....*

The example below shows the start of a L2 map. It shows who the activists are, where we still need activists, and who you could speak with to complete the map. Nonmembers are marked with red dots.

Helping develop the level 2 map is a good early task for new activists.

Employer	Worksite	Member Name	Job Title	Activists	Gender	Contact (where needed)
ABC Academy	School A	Bukola Okorie	Teaching Assistant		F	
ABC Academy	School A	Annemarie Umar	Teaching Assistant	Contact	F	Mobile: 123456
ABC Academy	School A	Tessa Townsend	??		F	
ABC Academy	School A	Kondrat Mills	Caterer	ERA	M	Mobile: 987654
ABC Academy	School A	Hilary Lindsey	Receptionist		F	
ABC Academy	School A	Cammie Midgley	??		F	
ABC Academy	School A	Shanti Joshi	Caterer		F	
ABC Academy	School A	Màiri MacRae	Teaching Assistant		F	
ABC Academy	School A	Hugo Quincy	Caterer		M	
ABC Academy	School A	Llewella Gough	??		F	
ABC Academy	School A	Holly Waller	??		F	
ABC Academy	School A	Ioana Munteanu	Teaching Assistant		F	
ABC Academy	School A		Teaching Assistant			
ABC Academy	School A		Teaching Assistant			
ABC Academy	School A		Cleaner			

Level 3 – Strategic Organising Map
































Purpose: When looking to build member participation in an escalating campaign to achieve a specific win, additional information is required to measure levels of member participation and activism. Often known as “charting”, recording attitudes and engagement in activity will provide a deeper understanding of our strengths and weaknesses prior to escalation of activity. L3 builds on L2 by categorising individual member’s support for a campaign and adding information regarding known participation e.g. whether the member has returned a survey, attended a meeting, signed a grievance, expressed interest in activist role etc.

Data: A category is assigned to members based on conversations and other interaction. A tried and tested method is as follows:

- 0- unknown (view towards the union / campaign is unknown at time)
- 1- “leader” with proven ability to move colleagues to activity
- 2- “activist” with record of UNISON participation and activism
- 3- “supportive” of campaign activity / goals
- 4- “neutral” towards campaign activity goals
- 5 - “unsupportive / against” campaign activity / goals.

It is important that members are only categorised following an interaction. Until then they remain a “0”. We must not categorise based on assumptions or previous experience. A members’ support for this campaign may be very different from previous campaigns.

By mapping in this way, we can understand the concerns and potential influence of the 5s and plan activity to move the 4s to 3s, increase the number of 2s and identify the 1s - building a strong and powerful workplace union.

School A						
#	Member Name	Member at start	Job Title	Filled in survey	Attended meeting 1	Signed grievance
2	Bukola Okorie		Teaching Assistant			
3	Annemarie Umar		Teaching Assistant			
0	Tessa Townsend		??			
1	Kondrat Mills		Caterer			
4	Hilary Lindsey		Receptionist			
3	Cammie Midgley		Cleaner			
3	Shanti Joshi		Caterer			
3	Màiri MacRae		Teaching Assistant			
3	Hugo Quincy		Caterer			
0	Llewella Gough		??			
0	Holly Waller		??			
4	Ioana Munteanu		Teaching Assistant			
0			Teaching Assistant			
5			Teaching Assistant			
0			Cleaner			

Level 4 – Industrial Action Map

Purpose: An industrial action or statutory union recognition ballot is an extreme situation, governed by law and directly challenging the interests of the employer and the balance of power in the workplace. Significant preparation and planning is required in terms of data cleansing to ensure the integrity of the ballot process. And a deeper level of member mapping is required to understand ballot voting intention, ballot return and support or otherwise for action.

Data: Several specific pre-ballot reports are available from WARMS / Merlin which identify potential data deficiencies that could undermine the ballot and need to be addressed - including unknown job codes, unknown workplace, invalid postcodes, returned mail. For members who pay by direct debit particularly, it is also necessary to check workplace and job codes are correct prior to ballot. Further information on pre-ballot data cleansing is available in the [UNISON Industrial Action Handbook 2019](#).

By adding this pre-ballot data to the L4 map, data cleansing can be incorporated into organising activity and escalation to ensure data gaps and inaccuracies are identified and resolved before any ballot. It is good practice to ensure the employer DOCAS records have been recently processed to avoid out of date mapping and inaccurate ballot data. Mapping should be regularly updated using information gathered by organisers and activists through workplace conversations or through phone and text exchanges via UNISON's "Movement" system.

In the example below, you can see that overall membership density is 80%. However, it shows that only four of the twelve members have returned their ballot paper so far. The map also highlights the strong level of campaign support in the catering department, as all caterers are members and have signed the grievance. Amongst Teaching Assistants, however, you can see support for the campaign is weaker despite one TA being an activist. Out of seven TAs, only two have returned their ballot paper so far, and another two have not been involved in the campaign at all. This map will enable you to focus efforts and resources to ensure the highest possible ballot return.

School A									
#	Member Name	Mem. at start	Job Title	Survey	Meeting 1	Grievance	Mobile # correct	Home add. correct	Ballot received (R), returned (RR)
2	Bukola Okorie		Teaching Assistant						
3	Annemarie Umar		Teaching Assistant					?	?
3	Tessa Townsend		Teaching Assistant						
1	Kondrat Mills		Caterer						
4	Hilary Lindsey		Receptionist				?	?	?
3	Cammie Midgley		Cleaner						
3	Shanti Joshi		Caterer				?		
3	Màiri MacRae		Teaching Assistant						
3	Hugo Quincy		Caterer						?
1	Llewella Gough		Receptionist					?	?
3	Holly Waller		Receptionist						
3	Ioana Munteanu		Teaching Assistant						
0			Teaching Assistant						
5			Teaching Assistant						
0			Cleaner						

The above examples of mapping are for illustration. They can be amended and expanded according to the goals and activity of a campaign, within the parameters of this guide. More detailed templates can be accessed on the UNISON Organising Space.

GDPR: Seven data protection principles

1. **Lawfulness, fairness, and transparency;** personal data shall be processed fairly and lawfully and in a transparent manner.
2. **Purpose limitation;** personal data shall be collected for a specific, explicit, and legitimate purpose and not further processed in a manner that is incompatible with that purpose.
3. **Data minimisation;** personal data shall be adequate, relevant, and not excessive for the purpose of the processing.
4. **Accuracy;** personal data shall be accurate and where necessary, kept up to date.
5. **Storage limitation;** personal data shall not be kept for longer than is necessary for the purposes of the data processing.
6. **Integrity and confidentiality;** personal data shall be processed in a manner that ensures appropriate security of the personal data.
7. **Accountability;** those processing data must be accountable for their actions in processing data.

Data breaches, if serious enough, can lead to significant sanctions by the Information Commissioners Office, which also has the power to stop UNISON from processing data. Further GDPR advice and information is available on the data protection tile on the Organising Space (see below). If there are any doubts or questions around the GDPR aspect of your mapping exercise, please contact the data protection team at dataprotection@unison.co.uk.

Organising to Win resources

Ultimately all organising is a set of tools and techniques deployed to shift the balance of power in favour of our members. How those tools are deployed will vary in different circumstances but generally the fundamentals remain the same.

Our Organising to Win webinars and resource library provide a growing set of organising guides including:

Organising conversations
Leader identification and activist recruitment
Workplace mapping and charting
The organising and equality impact assessment template and guide
The five-phase plan to win template and guide (Strategic organising)

This guide is one of many key organising resources in the Organising to Win series. UNISON activists and staff can access all resources at:

The Organising Space

UNISON's online platform for activists. Visit the Organising to Win tile at organisingspace.unison.org.uk

Pearl

The UNISON staff intranet. Visit the Organising to Win page.

Had an organising win?

Let's celebrate and share what works! Send a summary to win@unison.co.uk