

NIPSA Transformation Programme 2026–2030 (Draft)

For NIPSA Members and NIPSA HQ
Employee Engagement & Consultation

Draft proposal ©, by Dáire Hamilton-Toner

Contents

1. Executive Summary	6
Context and Need	6
The Proposed Transformation	6
Structure of the Programme	6
Member Involvement	7
Outcomes by 2030/31	7
Conclusion	8
2. Background and Case for Change	9
Why Transformation is Needed.....	9
In summary	10
3. Vision and Goals	11
Vision	11
Goals – Expected Achievements by 2029.....	11
4. Guiding Principles.....	13
5. Programme Governance and Oversight	15
Programme Governance Structure	15
Accountability and Reporting	15
Risk Management & Assurance.....	16
Member Engagement and Co-Design Mechanisms.....	16
Democratic Safeguards.....	17
6. Programme Phasing	18
Phase 0 – Start-up & Baseline (September – November 2026).....	18
Getting Organised and Setting Baselines.....	18
Phase 1 – Early Wins & Foundations (December 2026 – April 2027).....	18
Delivering Quick Wins and Building Confidence.....	18
Outcome.....	19
Phase 2 – Design & Pilot (May 2027 – January 2028).....	19
Building and Testing Major Reforms.....	19

Outcome..... 21

Phase 3 – Rollout & Integration (February 2028 – April 2029)..... 21

 Implementing changes union-wide and embedding them..... 21

 Outcome..... 23

Phase 4 – Optimisation & Handover to BAU (May 2029 – April 2030)..... 23

 Fine-tuning, evaluating, and ensuring sustainability. 23

 Outcome..... 24

7. Detailed Draft Transformation Projects..... 25

Project 1: “NIPSA as an Exemplar Employer” – Staffing, Culture & Internal Capacity... 25

 Purpose & Rationale 25

 Key Activities..... 25

 Sequencing & Milestones..... 26

 Benefits to Members 27

 Measuring Success..... 27

Project 2: “Democracy That Works” – Union Constitution & Democratic Processes 29

 Purpose & Case for Action..... 29

 Key Activities..... 29

 Sequencing & Milestones..... 30

 Member Benefits..... 31

 Measuring Success..... 31

Project 3: “Organising, Activism & Bargaining Power” – Boosting Member Participation
and Representation 33

 Key Activities..... 33

 Purpose & Case for Action..... 33

 Sequencing & Milestones..... 34

 Benefits to Members 35

 Measuring Success..... 35

Project 4: “Strategy & Sustainability” – Five-Year Strategic Plan & Implementation..... 37

 Purpose & Case for Action..... 37

Key Activities..... 37

Member Benefits..... 38

Measuring Success..... 38

Project 5: “Digital Transformation” – Modern Systems, Data & Communication Tools.. 40

 Purpose & Case for Action..... 40

 Key Activities..... 40

 Sequencing & Milestones..... 42

 Benefits to Members 42

 Measuring Success..... 43

Project 6: “Service Excellence & Accountability” – Consistent High-Quality Member Services..... 44

 Purpose & Case for Action..... 44

 Key Activities..... 44

 Sequencing & Milestones..... 45

 Benefits to Members 46

 Measuring Success..... 46

Project 7: “Financial Sustainability & Accountability” – Securing Resources & Transparency..... 47

 Purpose & Case for Action..... 47

 Key Activities..... 47

 Sequencing & Milestones..... 48

 Governance & Accountability 48

 Benefits to Members 49

 Measuring Success..... 49

8. Conclusion..... 50

 A Union Renewed 50

 Member-Centric Change..... 50

 Tangible Improvements..... 50

 Sustaining Momentum 51

 Your role – making it happen 51

9. Conference Decisions Requested (To go to special Delegate Conference) 52
Conference is asked to: 52

1. Executive Summary

Context and Need

NIPSA faces critical challenges amid a rapidly changing environment. Over the past decade, our membership has fluctuated, with a net decline of around 4,500 from 2012 to 2022 due to public sector cuts and retirements. While membership has recently rebounded to ~47,000 by late 2024 through renewed recruitment efforts, the union’s organisational infrastructure and engagement models have not kept pace with evolving needs. Key systems (e.g., a 20-year-old membership database) and processes are outdated, resulting in slower responses and greater inefficiencies. Members today expect quicker support, more transparency and involvement, and easy digital access to their union. Externally, economic challenges (cost-of-living pressures), workers’ rights legislation delay, and new work patterns call for a better organised, more agile union.

The Proposed Transformation

The Draft NIPSA Transformation Programme 2026–2030 is a unified plan to address these issues and renew our union’s strength. It merges existing organisational improvement efforts (including the Organisation Redesign Programme launched by me when NIPSA President in 2023 that was shelved by subsequent General Councils without an alternative plan) into a single coordinated framework. This Programme is built on the understanding that to protect and advance members’ interests in future, NIPSA must adapt now. Its goal is to create a union that’s easier for members to engage with, faster in how it responds and provides support, stronger in workplace organising and negotiations, and sustainable for the long term.

Structure of the Programme

This draft Transformation Programme consists of seven interrelated projects, each targeting a specific area:

- 1. NIPSA as an Exemplar Employer (Project 1)** – Optimising our internal staffing structure, culture, and processes.
- 2. Democracy That Works (Project 2)** – Modernising NIPSA’s Constitution and democratic procedures to boost member participation and transparency.

- 3. Organising, Activism & Bargaining Power (Project 3)** – Rebuilding our organising strength, expanding our representative network, and raising member participation in campaigns and ballots.
- 4. Strategy & Sustainability (Project 4)** – Developing a five-year Strategic Plan (2026–2031) reflecting members’ priorities and ensuring long-term strategic and financial stability.
- 5. Digital Transformation (Project 5)** – Upgrading our membership systems, data, and communications (including a new member portal and improved communication tools) to better connect and empower members and activists.
- 6. Service Excellence & Accountability (Project 6)** – Introducing clear service standards, consistent case handling, and quality assurance to improve member support.
- 7. Financial Sustainability & Accountability (Project 7)** – Strengthening budgeting, financial controls, and transparent reporting to secure NIPSA’s finances and resource our future.

Member Involvement

Fundamental to this draft Programme is a member-led, co-design approach. This means that members will actively shape the changes through consultations at branch meetings, working groups, surveys, pilot tests, and feedback loops. For example, branch meetings and working groups will contribute to designing new service standards and the member portal, and members will be invited to pilot new digital tools or give input on rulebook changes.

Outcomes by 2030/31

This draft Transformation Programme is designed to produce tangible improvements that members will experience firsthand:

- **Stronger Democracy:** Higher turnout in union ballots and elections, with more accessible and flexible ways to participate (including established remote/hybrid participation options). Decisions will have greater legitimacy and reflect a broader base of members.

- **Better Decisions:** Decisions made at all levels of NIPSA are a true reflection of the whole membership and not solely those of a narrow subset.
- **Better Member Service:** Every member will receive timely advice and representation, guided by published service standards (e.g., rapid response targets) and delivered by a well-supported, professional staff.
- **Increased Organising and Bargaining Power:** More active representatives across all workplaces and greater participation in campaigns and ballots will give NIPSA considerably more leverage in negotiations. This means better chances of winning improved pay and conditions for members.
- **Modern Communication and Digital Access:** A secure “MyNIPSA” member portal and updated IT systems will make engaging with NIPSA convenient (members can update details, get information, and participate in union activities online). Multi-channel communications (email, text, etc.) will keep members more informed and involved, regardless of location or schedule.
- **Sustainable and Accountable Operations:** Internally, NIPSA will have a more effective staff structure (agreed with the staff’s Trade Union Side), improved internal policies, employee training and development opportunities, and strong financial management. This ensures the union’s

Conclusion

This draft Transformation Programme is an ambitious but necessary path to ensure NIPSA remains a powerful, relevant voice for members now and in the future. It is built on the union’s fundamental values – democracy, solidarity, fairness – and is structured in phases with clear oversight to deliver real improvements, not just promises. With NIPSA membership and HQ staff backing and active participation, this Transformation Programme will make NIPSA stronger, more resilient, and truly member-driven.

2. Background and Case for Change

Why Transformation is Needed

NIPSA has been a steadfast advocate for its members, but the environment within which we operate is changing rapidly, presenting both challenges and opportunities. Key factors driving the need for this draft Transformation Programme include:

- **Membership Trends:** Between 2012 and 2022, NIPSA’s membership declined by approximately 14% (from roughly 46,500 to around 40,000) as a result of factors such as job cuts, retirements, and hyper-austerity in our sectors. In 2023–2025, concerted recruitment efforts and high-profile campaigns (like the Northern Ireland Civil Service pay dispute) helped to win new members and bring total membership back to roughly 47,000 but dropped to 45,000 thereafter. However, continued membership growth is not guaranteed without stronger organising and retention strategies. We must actively recruit and engage new members to remain a strong voice for working people.
- **Outdated Systems & Processes:** Much of NIPSA’s internal infrastructure has lagged behind modern best practices. For example:
 - We rely on a membership database from the mid-2000s that lacks self-service functions, which leads to manual data updates, slower service, and errors.
 - Communication with members has traditionally been via one-size-fits-all emails or mailed circulars, which many members overlook. We haven’t fully leveraged modern targeted communications and multi-channel outreach (text, social media, etc.), limiting our reach and capability to mobilise quickly.
 - Internal workflows and case handling processes are not uniform; they depend heavily on individual knowledge, which can result in inconsistent experiences for members.
 - Our governance practices (like conference and elections) still largely rely on in-person processes, even though we started using remote participation technologies during the pandemic. We now need to

formalise those practices and ensure our rules and systems support them fully.

- **Member Expectations:** The bar for service and engagement has risen. Members today expect prompt responses when they contact their union, and clear, frequent updates on the issues they care about. They want greater transparency – to know what the union leadership is doing and how decisions are made. They also want to have an input into decisions that affect them, and for their union to actively seek their views (rather than just once a year at branch AGMs or only during conflicts). Without meeting these expectations, the union risks a detachment or disengagement of the membership, which weakens us all.
- **Participation & Activism:** Many NIPSA members are not as active in the union as they could be, often due to lack of opportunities or information rather than lack of interest. For example, many branch committees have unfilled positions, turnout in some ballots or elections is lower than desired, and committees like NIPSA Youth have been limited. We must modernise how we involve members and remove barriers to engagement (like travel or lack of information) to reinvigorate our democratic life and collective activism.
- **Bargaining and Campaign Challenges:** With rising inflation and pay disputes, we face employers and government that are often unwilling to meet our demands without significant pressure. We need to maximise our ability to organise and mobilise members to apply that pressure, which in turn requires strong internal organisation, data, and communication channels.
- **The Need for Strategic Focus and Sustainability:** In the absence of a current strategic plan (in truth no strategic plan at all), NIPSA risks spreading its efforts too thin or missing opportunities. A long-term plan, informed by members, is needed to ensure we prioritise effectively and make deliberate progress, rather than reacting to events. In addition, it's vital that we manage our finances carefully. Rising costs, if unaddressed, could eventually force us to cut services or raise fees abruptly – so we need prudent planning to maintain our financial health while funding these improvements.

In summary

The case for transformation is clear: to maintain our relevance and bargaining power, we must modernise our operations, engage members more deeply, and build an organisation that's fit for future challenges. This draft Transformation Programme is our comprehensive response to these needs.

3. Vision and Goals

Vision

This draft Transformation Programme is driven by the vision of a modern, member-focused NIPSA that is easy to participate in, swift and consistent in its support to members, well-organised in every workplace, and sustainable and influential going forward.

This means a union where:

- **Members feel ownership of their union** and have accessible avenues to shape decisions.
- **Support is timely and effective**, with clear standards and professional service.
- **Collective strength is maximised** through a larger, engaged membership and high participation in union actions.
- **Digital tools** connect members, reps, and staff seamlessly, enhancing both communication and organising capabilities.
- **Transparent governance and prudent finances** reinforce trust and ensure the union's longevity.

Goals – Expected Achievements by 2029

This draft Transformation Programme defines clear goals aligned with this vision:

- **Democratic Renewal:** Increase member participation in union governance and actions. For example, raise election and ballot turnout, ensure more members attend and contribute to branch meetings and conferences, and encourage more diverse candidates for union positions.
- **Service Improvement:** Meet or exceed rigorous service standards (like response times) at least 90% of the time, as measured by tracking and member feedback. Ensure members across all sectors report higher satisfaction with union support.

- **Organising Growth:** Achieve continuous membership growth (with yearly net increases rather than stagnation or decline) and expand the cadre of trained workplace reps by, say, 20–30%. Aim for a representative in every workplace and significantly higher member engagement.
- **Digital Empowerment:** Have the majority of members using the MyNIPSA portal for updates and services. Ensure communications reach virtually all members through at least one channel (post, email, or text), eliminating the information ‘black holes’ where some members previously got little union contact.
- **Financial Stability:** Maintain a balanced budget (or any deficits only for planned investments) each year and rebuild financial reserves to a robust target level. Ensure any proposals on adjusting membership fees or cost structures are rooted in strong analysis and member approval.

These goals provide a measurable framework. They also align with specific Key Performance Indicators (KPIs) that will be tracked and reported on as part of programme management, holding the union to account for delivering real improvements.

4. Guiding Principles

This draft Transformation Programme will be carried out in line with core principles that reflect NIPSA's values and ensure the changes strengthen, rather than undermine, our union's character:

- **Member-Led and Inclusive:** Changes are driven by member input and oriented around the member experience. This means active involvement of members at every stage (via consultations, surveys, working groups, etc.) and designing improvements to be accessible to all parts of our membership. For instance, when creating digital tools, we will ensure usability across different devices and provide alternatives for those less digitally inclined, ensuring no one is left behind.
- **Transparency and Accountability:** We will be open about why decisions are made and how the programme is progressing. This includes regular updates to members on developments, honest communication about any delays or obstacles, and clear assignment of responsibility (so it's known who is accountable for delivering each part of the programme). Members will be able to see and measure what is being achieved and to hold their leadership accountable.
- **Democratic Control:** This programme does not bypass existing democratic processes; it strengthens them. All significant changes – especially any that affect our rules or member rights – will be decided through proper democratic channels (e.g., Conference motions or ballots). The General Council, and ultimately the membership, will always have the final say on key aspects.
- **Respect for NIPSA HQ Employees and Collective Bargaining:** We will uphold the union's own principles by maintaining a positive industrial relations climate within NIPSA. Any changes affecting NIPSA employees terms, working conditions, or the internal staffing structure will be developed in full consultation and negotiation with the NIPSA Headquarters (HQ) Trade Union Side (TUS) representing our employees. This approach aligns with our values and ensures staff are partners in the change, not simply subjects of it.
- **Practicality and Phasing:** The Programme is structured to be delivered in phases, enabling step-by-step implementation. Early wins will demonstrate what's possible and generate momentum. Pilots will let us learn and adjust

before scaling up. We will be realistic about capacities and timeframes, balancing ambition with what can be achieved with the resources we have.

- **Secure & Compliant by Design:** We will ensure all changes, particularly in digital systems or governance, adhere to legal requirements (data protection, election laws, etc.) and incorporate robust security and privacy measures. This is about protecting members and our union while innovating.

These principles are our compass throughout the transformation – keeping us true to our mission of improving the union for members without losing what will make NIPSA strong and democratic.

5. Programme Governance and Oversight

Programme Governance Structure

This draft Transformation Programme will be managed under a clear governance framework to ensure it remains on track, inclusive, and accountable:

- **Transformation Programme Board:** A proposed dedicated Programme Board to be established to oversee and guide implementation. It will consist of the General Secretary (as Programme Sponsor), the NIPSA President, a representative of the NIPSA HQ Trade Union Side (i.e., the staff's union representative), a representative from the Civil Service Group Executive, a representative from each of the PO Group sectors. This Board meets regularly to monitor progress, address issues, and coordinate across projects.
- **General Council:** The General Council holds ultimate responsibility for the Programme's direction between Conferences. It receives detailed progress reports at each meeting, and its approval is required for significant decisions, such as reallocating resources or endorsing proposals that will go to Conference. The General Council's involvement ensures that a broad, elected body of members is guiding the transformation.
- **Annual Delegates' Conference:** Conference remains the sovereign decision-making body. Constitutional changes or any policy shifts flowing from the Programme will be brought to Conference for debate and approval in the normal way (delegates will have full opportunity to discuss amendments, etc.). For instance, any rulebook changes from Project 2 or any modifications to subscriptions from Project 7 would be presented as motions or proposals at Conference for a vote. Likewise, a summary of progress and next steps will be reported at each Annual Conference during the Programme, allowing delegates to scrutinise and steer the ongoing transformation.

Accountability and Reporting

Each project has named leads who are accountable for delivering results, and each is subject to oversight. To keep the wider membership informed and involved:

- **Regular Updates:** We will publish quarterly progress bulletins for all members in plain language, highlighting what has been achieved in each project, upcoming

milestones, and any significant hurdles. These updates might be delivered via email, printed newsletter, and posted on the member portal, ensuring maximum reach. For major developments, special updates (e.g., an interim report on the Constitution review) will be shared promptly.

- **Transparency in the Numbers:** We will include key performance metrics in our updates (for example, how many new reps have been recruited, what the current membership figure is compared to the start, average query response times vs targets, etc.). Showing these numbers helps demonstrate impact and allows members to measure progress.
- **Ongoing Member Feedback:** Because members are part of co-design, their feedback will continuously inform how projects are adjusted or prioritised. The Programme Board will treat member feedback as a critical input, and decisions will be explained with reference to it (e.g., “Members told us X was a priority, so we re-sequenced the timeline to deliver that earlier”).

Risk Management & Assurance

The complexities of a programme of this scope necessitate careful risk management:

- We maintain a comprehensive **risk register** for the Programme, updated monthly. Key risks (like potential delays, cost overruns, or technical issues) are continuously assessed. For each risk, we identify mitigation strategies—for example, splitting a complex project into smaller parts to reduce risk, or having contingency plans if a technology solution doesn’t pan out.
- **Independent reviews or audits** will be used where appropriate to give additional assurance. For instance, if we implement an online voting system, we will have independent scrutineers verify its integrity before use. If we overhaul financial processes, we might bring in an auditor’s perspective on control improvements.
- **Member oversight** is another layer of risk control – by keeping progress transparent and within democratic channels, any significant concerns will be raised early by the membership or representative bodies, allowing for timely corrections.

Member Engagement and Co-Design Mechanisms

As noted, member engagement is integral to governance:

- **Branch Forums:** To ensure broad involvement, branches may host special meetings or agenda items specifically to discuss transformation topics, feeding back their collective input.
- **Project Working Groups:** Some projects will have working groups or reference panels where members, staff, and officers jointly shape outputs (for example, drafting teams for the constitutional reforms, or test user groups for the digital portal).
- **Surveys & Direct Feedback:** We will run multiple quick surveys/polls on specific questions (like “How do you prefer to receive union updates?” or “What improvements in service are most important to you?”) and share the results.
- **Pilots:** We will run pilot initiatives (trial runs) of new approaches in selected areas with volunteer branches or groups of members. Their experiences and feedback will refine the approach before scaling up.

Democratic Safeguards

To reiterate, nothing in this draft Transformation Programme bypasses union democracy:

- The draft Programme itself will be brought to a special Delegate Conference for endorsement, affirming that it is a membership-sanctioned plan.
- Rule changes recommended by the Programme will only take effect if and **when approved by Conference.**
- Major programme milestones, especially those affecting members’ rights or union rules, will be subject to further democratic input (for instance, by bringing updates or motions to subsequent Conferences or group committees as needed).
- The presence of a **staff Trade Union Side representative on the Programme Board** ensures that internal changes are considered with NIPSA employee’s perspective and negotiated rather than unilaterally implemented, reflecting our union’s values.

This governance and engagement approach ensures that the transformation is carried out **with discipline and oversight, but always under the union’s democratic control.** It provides multiple channels to keep things on track and to keep members informed and involved.

6. Programme Phasing

This draft Transformation Programme is structured in four overlapping phases. This phased approach allows for early results, reduces risk, and helps manage the workload:

Phase 0 – Start-up & Baseline (September – November 2026)

Getting Organised and Setting Baselines.

- **Programme Initiation:** Immediately following a special Delegate Conference 2026, the Programme Board and project teams will be formalised. The Board will confirm roles and responsibilities for each project, and set up meeting schedules and reporting templates.
- **Baseline Assessment:** An initial “current state” report will be compiled and shared with members – essentially a candid snapshot of where NIPSA stands in key areas (membership numbers, finances, service metrics, etc.) as we begin the transformation. This ensures we have a reference for measuring progress and shows transparency to the membership about starting conditions.
- **Initial Engagement:** Communication goes out to all members explaining the programme (likely via a special bulletin or digital newsletter), inviting members to participate in various upcoming consultations or pilot initiatives (e.g., inviting volunteers for working groups or early adopters for the portal beta test). This lays the foundation for ongoing co-design.

Phase 1 – Early Wins & Foundations (December 2026 – April 2027)

Delivering Quick Wins and Building Confidence.

- **Service Standards Introduced:** By late 2026, a first set of Member Service Standards (Project 6) will be launched and publicised. For example, we may implement a guarantee that all member inquiries will receive an initial response within 2 working days (with appropriate caveats for complex cases). This will be monitored and initial results shared to demonstrate improvement.
- **MyNIPSA Portal Launch (Release 1):** We will launch the first iteration of the MyNIPSA member portal (Project 5). At this stage, the portal will allow basic functions such as updating personal details, viewing news, and reading FAQs

about common member queries. This is a visible sign of digital progress. We'll gather user feedback and iterate on this portal in subsequent phases.

- **Constitution Review Underway:** The Constitution & Procedures Advisory Committee (Project 2) will have begun its work. By the end of 2026, they will present some initial findings or principles (for example, they might report that “members find section X of the rulebook unclear,” guiding the next steps).
- **Organising & Turnout Initiatives (Pilot):** We will test at least one targeted organising campaign (Project 3) on a small scale. For instance, identifying a workplace or small branch with low density and running a focused recruitment drive there, or trialling new ballot turnout techniques (like text alerts, phone banking) in an upcoming local ballot. Lessons from these pilots will inform wider rollout in Phase 3.
- **Communications Upgrades:** Implement initial use of targeted multi-channel communication tools. Members might notice receiving more tailored emails or SMS reminders about specific campaigns relevant to them. We'll also refine our email lists to reduce outdated contacts, already improving how we reach members.

Outcome

By the end of 2026, members should already see signs of improvement – faster replies when they contact NIPSA, a new portal to explore, and more consistent communications. Importantly, these early wins will be used to showcase the potential of the transformation and build support for the larger changes to come.

Phase 2 – Design & Pilot (May 2027 – January 2028)

Building and Testing Major Reforms.

- **Rulebook & Governance Drafts:** Using input from members (branches, committees, and surveys), the Constitutional Advisory Committee will develop a set of draft constitutional amendments and revised standing orders (Project 2). These could address provisions like clarifying the roles of the Civil Service and Public Officer Group structures, simplifying the process for motions at Conference, or incorporating remote participation into our rules (given that hybrid meetings are already in practice). The draft proposals will be shared in mid-2027

for further consultation with the membership (e.g., circulated to branches and published on the portal for comment).

- **Five-Year Strategic Plan Created:** After consulting widely, NIPSA’s new Strategic Plan 2026–2031 (Project 4) will be finalised in 2027 and formally launched (e.g., at Conference 2027). This plan will outline the union’s vision, major goals (like membership growth targets, service improvements, bargaining priorities), and initial initiatives to achieve them. The plan will also reflect the inputs from thousands of members’ ideas gathered through branch discussions and surveys.
- **Staffing Structure Proposal & Negotiations:** With the independent staffing review completed (Project 1), a proposed new HQ staffing structure will be presented by mid-2027. Importantly, this proposal will not be implemented unilaterally – it will form the basis for formal negotiations with NIPSA’s HQ Trade Union Side (TUS), in line with our established procedures. The goal is to reach an agreement on the new structure and any changes to roles or working practices by late 2027, ensuring staff are fully consulted and their rights protected.
- **MyNIPSA Portal Release 2 & Digital Pilots:** Building on feedback from Release 1, the portal will be expanded by mid/late-2027. New features may include a “Ballot and Campaign Hub” where members can see active ballots (with instructions and possibly the ability to indicate they have voted, if electronic balloting becomes legal and feasible), a training and events calendar with sign-ups, and a space for workplace reps to download resources or enter case updates. These features will likely be piloted first with a small user group (e.g., specific branches or committees) before general release, to ensure usability and iron out any technical issues.
- **Organising & Participation Campaigns:** After learning from Phase 1 pilots, we will implement several targeted organising and participation campaigns in 2027 under Project 3. For example, a cross-union “Member Get Member” campaign could incentivise members to recruit colleagues, or we might have a broad initiative focusing on recruiting younger workers or re-engaging lapsed members. Additionally, turnout-boosting strategies will be systematically used in any major ballots during this period (like pay disputes or elections), refining our playbook by finding out which tactics work best for our membership.

- **Service Process Finalisation:** By the end of Phase 2, we expect to have the new member support processes and SOPs (Project 6) fully documented and tested. For instance, we might run an internal pilot where the new inquiry triage system is used for all calls/emails to one of our offices for a few months, to work out any kinks and train staff. The results of these pilots will guide union-wide roll-out.

Outcome

Phase 2 is characterised by designing comprehensive solutions and testing them. By its close, NIPSA should have in hand: a near-final new Constitution ready for approval, a new strategic plan in motion, an agreed scheme for internal reorganisation with staff buy-in, an upgraded digital portal, and proven strategies for organising and service delivery. We will be ready to go big with confidence in Phase 3.

Phase 3 – Rollout & Integration (February 2028 – April 2029)

Implementing changes union-wide and embedding them.

- **Democratic Reforms Implemented (Project 2):** Assuming Conference approval in 2028/29, the new constitutional and procedural rules come into effect. This could involve things like implementing new voting systems for elections (e.g., if electronic balloting or new nomination processes were adopted and legal), adjusting the composition of certain committees, or rolling out simplified conference procedures. The membership and NIPSA HQ employees will receive guidance and training on any new rules to ensure a smooth transition (e.g., updated delegates' handbook for the next Conference).
- **Internal Restructuring and Policies (Project 1):** With agreements reached with the HQ Trade Union Side, the internal staffing restructuring will be executed during 2028/29. This may involve reassigning certain roles, hiring for new positions if needed (and if budget allows), and potential voluntary changes. Importantly, any restructuring will respect the principle that no permanent staff member suffers detriment; the aim is to improve how we work, not to cut headcount. Alongside structural changes, this period will see the formal adoption of updated internal policies on equality, anti-bullying, etc., which will be communicated to all staff and aligned with our values. Ongoing training will support staff through the transition, ensuring they can excel in the updated structure.

- **Organising and “NIPSA Academy” (Project 3):** The organising strategy moves into full gear. We anticipate that by 2029, numerous new reps recruited in 2026–28 will be fully trained and active. The NIPSA Academy (activist training programme) will be producing cohorts of skilled reps and campaigners. There will be visible differences: more union meetings and activities at workplaces; more communications and interactions run by reps; perhaps more frequent branch newsletters or social media presence – all reflecting a more engaged membership. Also, the cycle of election and ballot turnout improvements will continue upward as our methods are refined. By late 2028, we aim to see a noticeable uptick in participation metrics across the union.
- **Digital Tools Full Rollout (Project 5):** By this phase, the MyNIPSA portal should be fully operational for all members with near-complete adoption for key features. We will be actively promoting its use (e.g., a campaign urging members to register and verify their details online, perhaps with an incentive). Branch officers and reps will be using the new digital tools for their local tasks, such as pulling updated membership lists or sending targeted messages to members in their area, which in turn fosters better local engagement. The digital system’s analytics will allow us to identify and address any remaining gaps – for instance, if some members aren’t being reached by any channel, we will have data to follow up.
- **Service Excellence Embedded (Project 6):** The new member services model (triage system, service standards, etc.) will be fully implemented and integrated into daily operations. We will track how consistently standards are met and publicly share those results. By engaging in continuous improvement, any persisting issues (like an area not meeting standards) will be flagged and fixed. The result is that by the middle of 2029, adherence to service standards should be normalised and expected.

Outcome

By middle of 2029, the bulk of transformation changes should be in place and functioning union-wide. NIPSA will effectively be operating in a new, improved way, though we will continue to fine-tune and adjust as needed.

Phase 4 – Optimisation & Handover to BAU (May 2029 – April 2030)

Fine-tuning, evaluating, and ensuring sustainability.

- **Optimisation:** Use real-world experience to refine systems and processes. For example, if the portal's usage is strong but some features are underutilised, we might conduct another user survey to see what can be improved. If service standards are largely met, consider tightening them further or adding additional standards to push performance. This phase is about consolidating changes and making sure they provide maximum benefit.
- **Formal Benefits Realisation Review:** Conduct a full review to assess the benefits delivered by the Programme. Compare metrics from our baseline (Phase 0) to those in 2029 – e.g., membership number, turnout rates, response times, financial health. Document which targets were met or exceeded and which weren't fully achieved (with analysis of why). Summarise lessons learned.
- **Handover to Business-as-Usual:** Ensure all improvements become standard practice within NIPSA. Identify any aspects of the Programme that need ongoing maintenance or future development and incorporate those into normal work plans or committees (for example, if the digital portal requires an ongoing content manager or technical support plan beyond the Programme's life). Ensure staff and volunteer roles created during the Programme are integrated into NIPSA's regular operations (with budgets adjusted accordingly), so there is no drop-off when the Programme formally ends.
- **Final Reporting & Closure:** Prepare a final Programme completion report and present it to Conference 2030 (or 2031 if needed for a full four-year wrap-up). This will mark the formal closure of the transformation process as a special initiative. However, the cultural shift towards continuous improvement and member engagement should persist, meaning transformation becomes an ongoing mindset.

Outcome

NIPSA beginning of 2030 with the transformation successfully delivered, a robust set of improvements in place, and the union in a stronger position than at the start. Members will ideally feel the difference in how their union operates and be ready to continue evolving to meet future needs.

7. Detailed Draft Transformation Projects

Below, each draft Transformation Project is described in detail, including why it's needed, what it covers, how it will be implemented (with sequencing highlights), and how it benefits members.

Project 1: “NIPSA as an Exemplar Employer” – Staffing, Culture & Internal Capacity

Purpose & Rationale

Modernise NIPSA's own staffing structure and internal culture so that we can better serve members and demonstrate best employment practices. This project addresses known issues: our internal organisation has not been thoroughly and independently reviewed for years, potentially leading to inefficiencies, unclear responsibilities, and inconsistent ways of working. Staff have identified areas of heavy workload and support needs. Moreover, as a union, we must “walk the talk” in how we treat our employees, ensuring fairness, consultation, and growth opportunities.

Key Activities

- **Independent Staffing Review:** Commission an objective review of NIPSA's current staffing model (roles, team structure, workload distribution, skills mix). This will involve engagement with employees and the NIPSA HQ Trade Union Side (TUS) to understand their perspectives and suggestions. The reviewer will identify areas where our staff structure may not fully align with our current challenges (for instance, do we have enough resources in organising support? Are some roles outdated or overstretched? Could some processes be automated or redistributed?).
- **Design New Organisational Structure (with TUS Negotiation):** Using the review's recommendations, design a proposed new staffing structure that optimises capacity and clarifies responsibilities. For example, this might create distinct teams for member support vs. organising vs. communications, etc., with clear leadership and accountability in each. Crucially, any proposed changes will

be subject to negotiation and agreement with the NIPSA HQ TUS, following our collective bargaining procedures. This ensures our staff are fully on board and their terms are protected. A guiding commitment, as always, is that no permanent staff will face compulsory redundancy or unfair detriment due to these changes; improvements will be achieved through natural turnover, reassignments, or additional hiring where needed, rather than cutting vital staff.

- **Streamline Internal Procedures:** Develop and implement Standard Operating Procedures (SOPs) for key processes like handling member inquiries, managing case files, supporting negotiations, etc. This ensures that all staff and officials follow best practices and that members have a consistent experience. For example, if a member calls with an issue, there will be a defined set of steps and documentation that any staff member would follow (capturing details, assigning a case number, etc.), rather than ad-hoc handling. This reduces error, duplication, and variable service levels.
- **Staff Training & Culture Initiatives:** Invest in building our staff's capabilities and fostering a positive work culture. We will establish a staff development programme – offering training in areas like advanced employment law, negotiation, digital skills, and project management. Regular performance development reviews will be introduced (if not already) to support staff growth and identify training needs. Initiatives to improve work-life balance and well-being (e.g., reviewing workloads, encouraging team collaboration, recognising outstanding service) will be pursued. Additionally, internal policies will be updated to ensure they reflect best practice (e.g., a refreshed Dignity at Work policy to maintain a respectful environment, an Equality & Diversity policy to promote inclusiveness, etc.). These changes reaffirm our commitment to being a model employer.

Sequencing & Milestones

- By mid-2027: Complete the independent staffing review and share key findings with staff and General Council.
- Late 2027: Present a new staffing structure proposal. Begin formal negotiations with the HQ TUS on implementing changes (with a goal of reaching agreement by early 2028).
- 2028: Phased implementation of the new structure – possibly in stages or by departments – with parallel training and support for affected staff. Deploy new

SOPs across HQ step by step (possibly piloting them in one function before wider rollout).

- Late 2028: New structure fully in place and functioning. Continue to monitor and adjust as needed through 2029.

Benefits to Members

How does internal reorganisation help the membership? In several direct ways:

- **Quicker, more efficient service:** An optimised staff structure and clear processes will reduce delays. Members will notice that calls and emails are more systematically addressed. There will be fewer instances of “I left a message and didn’t hear back” because our team and procedures ensure follow-up
- **Higher quality support:** Well-trained, less overstretched staff can provide more thorough and proactive assistance to members. For example, with workload balanced, officials have more time to prepare cases or negotiations in depth, improving outcomes for members
- **Unbroken service:** Ensuring fair workloads and supportive culture means we retain skilled staff and avoid burnout, so that members can rely on continuity.
- **Credibility in negotiation:** When NIPSA negotiates with employers, pointing to our own fair and effective employment practices (like how we handled our own restructure collaboratively with the staff union) strengthens our hand. It shows we practice what we preach. This moral authority can sometimes give additional weight in pushing employers toward better behaviour in their workplaces.

Measuring Success

We will know this project is succeeding through:

- Meeting our service standards: for example, achieving our target response times and high member satisfaction in service surveys.
- Feedback from members indicating improvements (fewer complaints, more compliments).
- Internal metrics such as smaller backlogs or faster processing times.
- Staff indicators like improved staff survey results around workload and morale (showing the new structure is effective and not overloading individuals).

- Achieving a mutually agreed implementation with the TUS is in itself a success marker.

By combining efficient design with collaborative implementation (ensuring TUS negotiation and agreement), Project 1 sets the stage for all other changes by strengthening NIPSA's backbone – its people and processes.

Project 2: “Democracy That Works” – Union Constitution & Democratic Processes

Purpose & Case for Action

Simplify and strengthen NIPSA’s democratic structures and rules to empower members and improve decision-making. NIPSA’s Constitution is our democratic foundation, but over time it has become lengthy and complex, which can inadvertently create barriers to participation. For instance, new members often find the rules and procedures confusing. Moreover, aspects of our democratic process (like conferences and elections) could benefit from modernisation and better accessibility. While NIPSA has already adopted hybrid (simultaneous in-person and online) attendance for conferences and some meetings, these practices should be formally embedded in our rules and optimised further. We must ensure our democracy is both robust and convenient.

Key Activities

- **Constitutional Review Committee:** Establish a broad-based committee (including experienced activists from both membership Groups and relevant staff) to conduct a top-to-bottom review of the NIPSA Constitution, rules, and standing orders. They will identify pain points – e.g., rules that are unclear, structures that are not functioning as intended, or procedures that discourage participation.
- **Simplification & Modernisation of Rules:** Draft amendments to the rulebook and standing orders with a focus on clarity, brevity, and enabling member engagement. For example, clarify how members can submit motions or stand for positions in plain language, simplify the layered structure of committees if warranted (ensuring accountability while avoiding redundancy), and update language to remove outdated references.
- **Embedding Hybrid and Digital Participation:** Building on our experience of hybrid conferences and branch meetings (where remote participants join simultaneously with in-person attendees), formalise these capabilities. Proposals may include:

- **Rules for Remote Participation:** e.g., allowing Branch AGMs to include virtual delegates and detailing how their presence counts for quorum and voting.
- **Secure Electronic Voting:** Investigate adopting e-voting for internal elections or consultative ballots in a way that meets legal requirements and retains trust (for statutory ballots we must still follow the postal requirement until laws change, but technology can assist with informing and tracking turnout).
- **Technology Guidelines:** Develop best practice guidelines for hybrid meeting technology and training, to ensure remote participants have equal opportunity to engage.

Essentially, this project will make permanent what has been piloted out of necessity (like during the pandemic) and ensure our union’s democratic processes are accessible to members regardless of location or circumstances.

- **Consultation & Adoption:** Present draft rule changes to members well ahead of any Conference vote. This includes explanatory documents or roadshows (possibly online sessions to walk members through proposed changes and get feedback). Based on feedback, adjust proposals to ensure they reflect members’ will. Finalised rule changes (e.g., a revised Constitution and updated standing orders) will be presented to Conference (expected in 2028/29) for approval.

Sequencing & Milestones

- 2026: Form the Constitutional Review Committee and begin the review. Produce an initial “issues paper” listing areas of the rulebook that need change, by the end of 2026, and share with membership to invite further input.
- 2027: Develop draft new constitutional language and rules changes. Mid-2027, publish these proposals and conduct broad consultations (branch meetings discussing them, an online platform for feedback, etc.).
- Early 2028: Finalise proposals for Conference. General Council to approve putting them forward.
- Conference 2028/2029: Debate and vote on the package of rule changes.

- **Post-2028/2029:** If approved, implement changes: update union publications, educate membership on new processes (perhaps through a “Know Your Union’s New Rules” guide or training).

Member Benefits

Modernising our democracy yields long-term benefits:

- **Greater accessibility:** By sanctioning remote participation, more members can join important meetings or become delegates without the barriers of travel or scheduling. This is particularly beneficial for members with disabilities, caring responsibilities, or those geographically distant.
- **Stronger voice:** If electronic or alternative ballots can be used (in compliance with any legal demands), more members might vote because it’s easier than mailing back a paper ballot – potentially doubling or tripling participation in some internal elections. This amplifies the voice of the rank and file in choosing their leaders and deciding union positions.
- **Confidence in process:** When rules are clearer and participation easier, members – especially newer ones – will feel more comfortable taking part. That can rejuvenate our democracy with fresh perspectives and energy.
- **Faster decision-making:** Removing unnecessary procedural hurdles can allow the union to react more quickly (e.g., if special conferences can be convened in a hybrid manner with less lead time, we can collectively respond to emergencies without sacrificing legitimacy).

Measuring Success

We can track quantifiable improvements such as:

- **Higher turnout rates:** Did the changes lead to more members voting, attending meetings, or engaging in debates? We’ll compare before-and-after metrics for election turnout, conference attendance, number of branches represented at conferences, etc.
- **Member feedback:** Are members reporting that they find it easier to understand union processes and feel more empowered to participate?

- **Seamless adoption of hybrid practices:** After formalising hybrid meetings, measure if technical issues are minimised and remote attendees feel equally involved (this could be assessed via follow-up surveys after conferences).

Ultimately, success is demonstrated when NIPSA's democratic processes are widely seen as accessible, clear, and robust, with more members taking part and feeling that they have genuine influence in their union.

Project 3: “Organising, Activism & Bargaining Power” – Boosting Member Participation and Representation

Purpose & Case for Action

Re-energise union presence on the ground and engagement of the membership to strengthen NIPSA’s collective power. In recent times, our ability to win big improvements (especially on pay and conditions) has been constrained by limited member participation in decisive moments. Some branches struggle to mobilise for action or even to fill key roles, and membership density is uneven across workplaces. This project tackles the root of those issues: building a more active membership and a stronger network of union representatives, which is crucial for effective organising and bargaining.

Key Activities

- **Organising & Recruitment Strategy:** Develop a comprehensive Organising Strategy that targets growth and greater activism. This includes systematically mapping workplaces to identify where NIPSA has few or no members and planning campaigns to recruit new members there. For example, if some health trusts have low union density, we might run a concentrated recruitment campaign with extra resources and visits in those areas.
- **“Active Member” Pathways:** Create structured pathways that encourage members to get more involved at their own pace. For example, a member might start by attending a union event, then take a short online training or volunteer for a small role, and eventually become a workplace representative. We will produce clear materials that show members “how to get involved” and ensure follow-up – e.g., if someone expresses interest in activism, they get invited to a training or paired with a mentor.
- **Expand and train the rep network:** Launch what we call a “NIPSA Academy” (as a concept), which is a formal programme for representative and activist development. Through this, we will offer systematic training (basic to advanced) to equip reps with knowledge in representing members, organising, campaigning,

health and safety, equality, etc. Coupled with mentoring, this will give our reps confidence and competence to lead workplace actions. We will advertise rep roles widely (e.g. directly to members in branches without a rep) and strive to recruit reps that reflect the diversity of our membership (encouraging participation of underrepresented groups).

- **Increase Ballot & Election Turnout:** Develop and deploy a Participation Uplift Plan. Concretely, we'll implement measures like:
 - Having each branch set up “voting champions” or teams who reach out to colleagues during ballots.
 - Using the new communications tools to send timely reminders and calls to action.
 - Encouraging a culture where voting in union elections and ballots is seen as a norm of membership.
 - Emphasising successes achieved when large turnouts have given us negotiating power (to reinforce why each vote counts). Over time, these efforts should turn around low-turnout trends.
- **Empowering branches with tools and support:** Ensure branches have the tools they need to organise effectively. This includes the digital support in Project 5, but also simpler things like updated branch officer handbooks, more accessible data on membership status in their branch, and advice from staff or experienced activists on organising best practices.

Sequencing & Milestones

- 2026: Begin mapping membership and identifying priority areas for intervention. Possibly start organising drives in one or two key areas (where we have immediate opportunities, such as an employer with known discontent where we could recruit members quickly by launching a campaign).
- 2027: Roll out the first phases of the NIPSA Academy training, producing a first cohort of new reps. Introduce turnout improvement tactics in scheduled ballots and measure impact.
- 2028: By this time, the rep network expansion should be in full flow, with a target of significantly reducing the number of workplaces with zero reps. A series of

membership drives and retention strategies (like campaigns highlighting union wins to retain newer members) will be running across sectors.

- 2029: Evaluate the success of the organising efforts by reviewing membership and rep stats, and institutionalise effective methods (e.g., making the NIPSA Academy a permanent fixture, continuing any beneficial recruitment incentives, etc.).

Benefits to Members

This project, perhaps more than any other, goes to the heart of a union’s purpose – strength in unity. For individual members, results will include:

- **Better outcomes from collective bargaining:** When more members are actively behind union demands (demonstrated by strong ballot results or large support at rallies), employers are more likely to offer concessions. That can mean bigger pay rises or better terms than would otherwise have been achieved.
- **Enhanced support and solidarity at work:** With more colleagues joining NIPSA and more of them taking active roles, any member facing an issue at work is more likely to have a knowledgeable rep or fellow member to support them right there in the workplace. The feeling of solidarity increases as more colleagues “speak union.”
- **Greater influence in your union:** If more of your co-workers join and vote, the decisions and leadership of NIPSA will more accurately reflect your collective will, giving you confidence that the union truly represents the majority view.
- **Youth and new joiners integration:** Special efforts will likely be part of this project (though not explicitly listed above) to engage younger members and bring them into activism, securing the union’s future. Newer members will find pathways open to get active quickly if they wish, energising our culture.

Measuring Success

We will gauge our success via:

- **Membership and rep numbers:** e.g., membership hitting certain milestones (perhaps surpassing X-number of members by Y-year if growth is strong) and the ratio of members to reps improving.

- **Engagement metrics:** e.g., average branch AGM attendance, number of candidates for union positions, baseline vs new ballot turnout percentages.
- **Outcomes:** Are we more frequently meeting required ballot thresholds? Are negotiation outcomes improving (could be measured in e.g., average pay claim vs pay award differences)?
- **Qualitative:** Branch reports and member stories indicating increased activity and morale.

By rebuilding our organising muscle, Project 3 directly strengthens every other aspect of the union's work, because an engaged membership is the ultimate source of union power.

Project 4: “Strategy & Sustainability” – Five-Year Strategic Plan & Implementation

Purpose & Case for Action

Equip NIPSA with a clear strategic vision and plan, ensuring all parts of the union work cohesively towards shared goals and we secure the resources to achieve them. In the past, NIPSA’s large size and myriad responsibilities sometimes meant efforts were diffuse. A Strategic Plan focuses attention and fosters unity of purpose. Coupled with an explicit emphasis on sustainability (financial and organisational), this project ensures that improvements from other projects are anchored in a solid long-term direction and do not fade after initial enthusiasm.

Key Activities

- **Consultation for Strategic Priorities:** Through late 2026 and early 2027, gather broad member and activist input on what NIPSA’s priorities should be for the next five years. This could include targeted questions like “What do you think NIPSA’s top 3 priorities should be in improving your working life?” – answers may span pay, workload, job security, union communications, etc. These consultations will take place via branch discussions, surveys, and possibly dedicated regional or sectoral forums.
- **Drafting the Strategic Plan:** Using the consultation results and analysis of our environment, draft a Strategic Plan 2027–2032. The plan will likely reaffirm NIPSA’s mission and values, then outline major strategic objectives (e.g., “Grow membership by X%,” “Improve median ballot turnout by Y percentage points,” “Achieve specific bargaining outcomes,” etc.) and key initiatives to reach them. Each objective will have indicators or targets attached for accountability. This ensures the plan is actionable and trackable.
- **Approval and Launch:** Present the Strategic Plan to General Council for endorsement and to a special delegate Conference for formal acceptance (while a plan can be commenced by the Council, a Conference endorsement ensures whole-of-union legitimacy). Once accepted, circulate the plan to all members, possibly as a published booklet or via the portal, so everyone knows the union’s direction.

- **Integration & Annual Reviews:** Once the plan is launched (target mid/late 2027), align all the union’s segments to it. For example, departmental plans and budgets will explicitly tie back to strategic objectives. Every year, conduct an annual review of progress towards the plan’s goals and update actions as needed. This keeps the plan dynamic and relevant. If external changes occur (like new legislation affecting union operations or new sector opportunities), the plan can be adjusted with General Council oversight. Regular reporting (e.g., an annual “Strategic Plan Progress Report”) to Conference will become standard.

Member Benefits

- **Clarity and confidence:** Members will know exactly what their union aims to achieve on their behalf, making it easier for them to get behind those efforts. A clear plan also helps explain why certain decisions are made (because they tie into long-term goals), reducing confusion or the sense of ad-hoc leadership.
- **Optimised resource use:** A strategic approach ensures that the union’s limited resources (staff time, budget) are directed to what matters most to members (as identified through consultation). This means, for example, more investment in frontline representation or key campaigns, rather than scattered projects of less impact.
- **Continuity:** Even as elected leaders or circumstances change, the Strategic Plan provides a steady course. Members can rely on a degree of consistency – the union won’t drop an important initiative just because of short-term distractions, because the plan will keep pulling us back to the agreed priorities.
- **Enhanced outcomes:** Ultimately, a focused strategy should lead to more wins for members. If we’ve identified, say, that raising pay in local government is a strategic objective, we’ll allocate resources to that fight, coordinate campaigns around it, and measure progress – thus increasing our chances of success compared to an uncoordinated approach.

Measuring Success

The Strategic Plan itself will contain specific metrics. So success for Project 4 will be reflected in how well we meet those metrics – be it membership growth, financial stability, or improvements in member engagement. Another success criterion is the degree of adoption: do various parts of NIPSA actually use the plan to guide their work? We’ll look for evidence such as references to the plan in General Council discussions,

branch strategies aligning with the union’s strategic themes, and so on. A truly successful plan is not just written and shelved, but continuously referenced and updated.

Project 5: “Digital Transformation” – Modern Systems, Data & Communication Tools

Purpose & Case for Action

Bring NIPSA’s digital infrastructure and communications to a modern standard to improve member engagement, streamline operations, and strengthen organising. Our current digital setup is holding us back. The membership database and processes around it are outdated, making tasks like updating addresses or confirming ballot lists more cumbersome than necessary. Communications sometimes miss members or fail to engage them, and we haven’t tapped into the full potential of digital tools that other organisations use routinely. By updating our technology, we can become both more efficient in our work and more engaging for members – ultimately boosting union strength.

Key Activities

- **Membership System Upgrade & Member Portal:** Evaluate and choose the best path to a modern membership database that supports online access. Likely, this means moving to a modern, cloud-based membership system with integrated web functions. A flagship deliverable is the **MyNIPSA Member Portal**, which will provide members with secure, personalised access to their union. This portal will allow members to do things such as:
 - Update their personal and workplace information themselves (ensuring our records are always current without manual paperwork).
 - Check their membership status, see their branch and representative contacts.
 - Access union documents (pay agreements, representative contact lists, guides).
 - Participate in polls or indicative votes online (in a secure way).
 - (In later phases) For delegates or activists, access special tools (like conference documents, branch admin functions, etc.). This portal will be rolled out in stages – initial features in 2027 (focusing on personal

info and communications) and more features added by 2028–29 as per the roadmap.

- **Data Cleanup & Integration:** As part of deploying a new system, undertake a thorough audit and clean-up of member data. This involves contacting members to confirm details, reconciling any duplicate or outdated records, and establishing routines for keeping data up to date (like reminders for members to update their details). Also, integrate data flows, e.g., direct debit info and employer check-off lists will feed directly into the system to minimise manual updates. Good data is crucial to effective organising (we can't mobilise someone if we can't contact them).
- **Multi-Channel Communications:** Implement tools that allow segmenting communication so that members receive relevant information. For example, a system where we can filter by employer, grade, region, or interest to send custom messages. Alongside email, incorporate SMS texting for rapid outreach (many members will see a text faster than an email). Also leverage social media and the member portal as communication channels (e.g., push notifications from the portal/app). This coordinated approach ensures critical announcements or campaign calls get maximum reach – e.g., a strike vote could be accompanied by an email with detailed info, plus a last-day SMS reminder to vote, plus portal announcements and branch-level social media posts, all integrated.
- **Digital Tools for Activists and Branches:** Provide new digital features specifically aimed at branch officials and reps to help them serve members. For instance:
 - A branch secretary might use a portal feature to view up-to-date membership lists and send branch-specific announcements or meeting invites easily (without needing to get a list from HQ each time).
 - Reps could have an online repository of guides and templates for handling grievances or health & safety issues.
 - Possibly, an internal discussion forum or chat group for reps to share advice (with moderation to ensure it's constructive).

Essentially, empower members with technology that makes their union work simpler and more connected with the rest of the union.

- **Security, Privacy & Support:** All new digital systems will include strong security (e.g., encryption, multi-factor authentication for sensitive functions) and full compliance with data protection laws. We will also provide support to members to help adopt new tools (like helplines for portal login issues, training sessions for branches to use the new tools, etc.). The goal is to maximise adoption while minimising any tech frustrations.

Sequencing & Milestones

- 2026: Choose the path (upgrade existing system vs adopt new system). Launch initial portal features (as described in Phase 1) to give an immediate benefit and gather feedback. Start data cleanup efforts in conjunction with initial portal use (when members log in they can update details, that itself cleans data).
- 2027: Implement the core membership system upgrade or replacement (ensuring minimal downtime). Expand portal features (Release 2) and run pilot with volunteer members/branches. Introduce SMS and improved email capabilities and test them in a specific scenario (like an internal election or survey).
- 2028/29: Fully migrate to the new system if not already done; roll out advanced features to all (like branch admin tools, rep dashboards). Provide one-on-one or small group training to branch officials to ensure they can use the new tools effectively.
- 2029/30: Fine-tune and simplify any parts of the system or portal based on usage data (for example, remove or improve features that members find confusing, add any missing high-demand capabilities).

Benefits to Members

Digital transformation yields many concrete improvements:

- **Convenience:** Updating your info, checking your union membership or understanding your benefits can be done at 9pm from your own device instead of needing to call during office hours. This means fewer administrative hassles and quicker resolution of small issues (like changing an address or accessing a needed document).
- **Timely, relevant communications:** Members will be more informed. For example, someone working in a local council will get emails about local council issues, while a health worker gets health sector updates. And for big union-wide

issues, no one is left out because we'll use every channel (email, text, social posts, portal) to spread the word. When important events happen – e.g., a major negotiation update – you'll hear about it promptly via your phone or computer.

- **Greater engagement opportunities:** A digital presence can actually encourage more interaction than physical-only approaches, because it overcomes barriers of geography and time. A member who can't attend a midday meeting can still respond to a quick online poll or join a short virtual meeting after work. This means more members can have input, even if their schedules or locations prevent traditional involvement.
- **Strengthened organisation:** For instance, in an industrial action scenario, having a strong database means we can accurately target non-voters with reminders, or quickly generate picket shift plans for every location because we know exactly who works where. Good data is power – it allows fine-grained organising that can tip the balance in tight votes or negotiations.

Measuring Success

We'll evaluate this project by looking at:

- **Member usage and satisfaction:** e.g., what percentage of members register and use the portal; feedback from user surveys on how helpful they find it.
- **Communication metrics:** reductions in undelivered communications, increases in open rates or member response rates
- **Operational improvements:** e.g., time taken to process membership updates goes down from weeks to days, support calls about membership issues reduce because members can self-serve, etc.
- **Organising outcomes:** by 2029, we might correlate how the improved digital tools contributed to higher ballot turnouts or faster campaign mobilisation (qualitatively or quantitatively, like noting how quickly we can reach and rally members now versus before).

In short, Project 5 underpins many other projects (like enabling the communications needed for organising, or the data needed for strategy). When done, members will likely wonder how we managed before without these modern conveniences and capabilities.

Project 6: “Service Excellence & Accountability” – Consistent High-Quality Member Services

Purpose & Case for Action

Guarantee that every member receives prompt, effective support and that the union holds itself accountable to delivering this. NIPSA exists to serve its members, but without clearly defined service levels, the quality of support has sometimes been uneven. Some issues have taken too long to address, and members may not always know what to expect. Instituting formal service standards and quality control will professionalise our service delivery, much as any high-performing service organisation would, ensuring all members can rely on their union equally.

Key Activities

- **Service Catalogue & Standards:** Develop a Service Charter listing key services and expected standards. This could include:
 - Response times (e.g., initial acknowledgment in 1–2 working days; substantive answer or update on a query within, say, 7 working days unless it’s a very complex issue).
 - Turnaround targets for case handling (like average time to conclude a typical grievance support case).
 - Commitments in communications (like providing timely updates after major negotiations or decisions).

These standards will be realistic but also represent improvement from the status quo. They will be shared with members so everyone knows what to expect.

- **Frontline Triage & Tracking:** Implement a central Member Enquiry Tracking System at HQ and within the Branches. When a member inquiry comes in, it will be logged and tracked until resolution. We’ll have designated staff in HQ and at Branch-level; responsible for managing the intake and making sure each one is assigned and handled. Members will receive reference information (like a case

number or just the name of who is dealing with their query) so they have a point of contact and clarity on progress.

- **Standardised Procedures:** Coupling with Project 1, ensure the new SOPs for casework and inquiries are followed. For example, if a case isn't resolved by the initial person, there's a step to automatically escalate it to a senior official after a certain timeframe. This guarantees issues aren't left unresolved.
- **Member Feedback & Continuous Improvement:** Establish simple feedback channels for members to rate or comment on the help they received. E.g., after a case is closed, we might send a short survey: "Were you satisfied with the support? Was the outcome explained to you?" Compliments will be passed on to highlight good practice; complaints or suggestions will be reviewed to identify what went wrong and fix it. We'll share some of these aggregated results regularly (transparently acknowledging areas to improve).
- **Membership "You Said – We Did":** As mentioned earlier, part of being accountable is reporting back. For services, we could include in our quarterly updates a section like: "Members mentioned delays in X process, so we have now added an extra staff resource in that area," or "We realised many members didn't know how to access Y benefit, so we created a guidance note and posted it on the portal and branches." This shows a cycle of feedback driving continuous service enhancements.

Sequencing & Milestones

- Late 2026: Introduce some immediate service improvements (like confirming a commitment to faster initial responses). This can happen quickly once we set the expectation and if needed adjust internal allocation.
- Mid 2027: Finalise and publish the formal set of service standards. Begin tracking performance and training staff to meet these standards.
- Throughout 2027/28: Roll out the new triage system and tracking for inquiries (likely after some testing in one office). Start the feedback surveys.
- 2028/29: All offices working under the refined processes. Possibly update the standards if we start meeting them consistently (like raising the bar further).
- 2029/30: Operationalise everything as part of routine practice. Service reviews may become part of an annual cycle (like an annual "service quality report").

Benefits to Members

- **Predictability and reassurance:** Every member, irrespective of location or grade, will know the union’s commitments – if you contact us, you will get a response by a certain time, and you’ll know how your case is being handled. This gives peace of mind during stressful times.
- **Better outcomes:** By being systematic, we reduce mistakes or overlooked details and ensure appropriate expertise is involved where needed. That means, for example, a complex case gets escalated to someone with specialist knowledge promptly, improving the chance of a favourable outcome.
- **Faster resolution:** Time saved in administrative inefficiencies is time that can be redirected to solving member problems. Thus, members should see overall quicker resolution of their issues, from disputes settled to questions answered.
- **Trust and satisfaction:** Knowing that the union is measuring and reporting on performance will give members confidence that we take their concerns seriously. The union-member relationship strengthens when promises are clearly made and consistently kept.

Measuring Success

- **Service metrics:** The key gauge is meeting or exceeding the new standards. For example, if one standard is “initial response in 2 days”, we will measure what percentage of incoming contacts meet that.
- **Member satisfaction:** Increase in positive feedback and decrease in complaints about union support. We can aim for a specific improvement in satisfaction survey results by 2029.
- **Case resolution speed:** Possibly measure an overall reduction in average time to close member cases or number of cases pending beyond a certain timeframe.

In summary, Project 6 means that by 2029/30, members can rely on NIPSA to respond quickly and effectively, and the union can demonstrate that reliability with data.

Project 7: “Financial Sustainability & Accountability” – Securing Resources & Transparency

Purpose & Case for Action

Ensure NIPSA’s finances are stable and well-managed to support members’ needs now and into the future, with clear accountability of how members’ money is used. Our union’s strengths rely on steady resources. If we don’t manage finances carefully, we could face shortfalls that jeopardise services or require sudden fee increases – outcomes we want to avoid. This project is about proactively managing money so that we can fund all other initiatives and maintain our union’s capacity.

Key Activities

- **Strategic Budgeting:** Adopt an improved budgeting process where each major expenditure is linked to strategic priorities (from Project 4’s Strategic Plan) or required services. This ensures we spend money where members get the most benefit. An annual budgeting calendar will start earlier to allow robust discussion at General Council (with options scenario planning) rather than reactive adjustments.
- **Financial Control Strengthening:** Update internal financial control procedures – e.g., ensure multiple sign-offs for large payments, improve tracking of project spending, and perform mid-year financial health checks. This tightens oversight without impeding necessary spending on member services.
- **Explore Subscription Model Options:** Undertake a careful review of the membership subscription system. The current formula (0.5% of salary with a cap) has served us well in maintaining affordability, but it has not changed in many years despite inflation. If it becomes clear that the union cannot sustain needed services and improvements under the existing dues structure, develop scenarios for modest changes (e.g., adjusting the cap). Any such change would be designed to be fair and progressive (protecting lower-paid members) and will only be pursued with full transparency and democratic approval at Conference.

- **Efficiency Measures:** Find ways to reduce costs without harming service – for instance, making more communications digital (to save on print/postage), optimising use of office space or technology to save administrative costs, etc. Even small savings add up and can either be reinvested in member services or help keep membership fees down.
- **Member-Focused Financial Reporting:** As part of being accountable, produce clear financial reports for members. This involves not only the formal accounts (which are presented annually at Conference) but also simpler breakdowns in member communications (for example, a chart showing “out of each £1 of dues, X pence go to representation, Y to organisation running costs,” etc.). By demystifying our finances, we invite members to engage with and understand union finances, which fosters trust.

Sequencing & Milestones

- 2026: Immediately incorporate transformation priorities into the 2027 budget planning cycle (ensuring funding for quick wins). Initiate a financial policy refresh, including formalising new controls, to be in effect by the end of 2026.
- 2027: Provide the first enhanced financial transparency report to members. If the Strategic Plan indicates potential funding gaps, start internal discussions on how to address them (cost savings vs. increasing revenue).
- 2028/29: If any subscription adjustments are thought necessary, develop proposals (with financial rationale and impact assessments) to bring to Conference. Consult with branches about these proposals well in advance of any decision.
- 2029/30: Reap some cost benefits from earlier tech investments (e.g., fewer manual processes might mean less overtime or temp costs). Ensure the final year’s budget seamlessly carries transformation improvements into ongoing operations (for example, budgeting for maintenance of the new portal or continuing any roles initiated by the transformation).

Governance & Accountability

The General Council’s Finance subcommittee (or equivalent) will be closely involved in Project 7, with regular scrutiny. The union’s external auditors will continue to audit accounts annually, providing independent assurance. And as always, members can ask questions about the accounts at Conference and through their branches.

Benefits to Members

- **Financial stability = reliable support:** With good financial management, the union can weather economic ups and downs without cutting services to members. This means, for example, that during a big industrial action (which can be costly if strike pay is involved), we know we have the reserves to support members for the duration needed.
- **Keeping contributions fair:** If we do need to propose any dues changes, it will be done carefully and fairly, and communicated transparently. Ideally, by managing money well and growing membership, we can avoid raising dues – or if adjustments are needed eventually, they can be kept minimal and equitable. This is better than facing a crisis later where a steep increase might be unavoidable.
- **Trust through openness:** Members work hard for their pay; by showing clearly how their union dues are put to use, we validate their trust. When members see that e.g., “a large portion of our budget goes to frontline representation and campaigning”, they understand the value of their membership. It can also motivate members to recruit others by showing the union’s impact.
- **More resources where needed:** In the best case, prudent finance combined with membership growth might even free up funds for new benefits (like expanding union learning programmes or increasing funds for member training or hardship support). At a minimum, it allows us to invest in critical areas like technology or organising which directly benefit members in improved outcomes.

Measuring Success

- **Financial health metrics:** Balanced budgets, or planned use of funds that is sustainable. Adequate reserves in line with union policy (for example, maintaining at least a certain number of months of operating costs in reserve).
- **Absence of crises:** If we reach 2030/31 without any “financial emergency” events (like cash flow crises or severe cuts needed), that’s a sign of success. The union should be financially stronger (or at least as strong) at the end of the programme as at the start, even after making the necessary investments.
- **Member perspective:** We can gauge whether members feel well-informed and comfortable about union finances via questions in member surveys or motions at Conference – ideally moving from possibly low awareness/trust towards greater trust and satisfaction regarding union accountability.

8. Conclusion

A Union Renewed

This draft NIPSA's Transformation Programme 2026–2030 is a comprehensive plan to modernise our union while staying true to our values. It is a proactive, member-driven response to the broad consensus that our union's structures and methods must evolve to meet modern challenges and member expectations.

Member-Centric Change

Across all projects, one theme stands out: members are at the core. This programme is not a top-down technocratic overhaul; it's a collaborative effort, with members shaping the changes through meetings, surveys, working groups, and feedback at every stage. This ensures the results of transformation truly serve the membership's needs.

Tangible Improvements

By the end of 2030, delegates and members should see clear evidence of a transformed NIPSA:

- Our union's democracy will be more accessible, with higher engagement and rules that facilitate remote participation and straightforward processes, thus harnessing the voices of more members.
- Member services will be markedly improved, with quick, reliable support whenever members need it and transparent standards to maintain quality.
- The union will be stronger in workplaces, boasting an expanded network of reps and higher participation in ballots, making our collective actions more powerful.
- Our communications will be timely and relevant, reaching every member, and members will have convenient digital tools to interact with their union.
- Internally, the union will function as a cohesive, well-oiled machine, with staff working under an agreed modern structure, empowered by training and clear processes, and with finances under control and aligned to the union's strategic goals.

Sustaining Momentum

This programme is not a one-off event but a stepping stone to an ongoing culture of adaptation and improvement. By investing in strategic planning and embedding continuous review cycles, we ensure that NIPSA doesn't stagnate once 2031 arrives. Instead, we will enter the 2030s with renewed energy, institutional knowledge on how to manage change, and an engaged membership ready to tackle the next set of challenges.

Your role – making it happen

NIPSA Members and NIPSA HQ staff will have been integral to designing this programme. By endorsing it at a special Delegate Conference and participating in its initiatives, you will help drive NIPSA's development. In return, the union's leadership is committed to delivering on these promises and regularly demonstrating how each change is benefiting the membership.

In conclusion, NIPSA thrives when it effectively channels the collective will and power of its members. This draft Transformation Programme 2026–2030 is about reinforcing that capacity – ensuring our union returns to be truly democratic, responsive, and strong. With unity and determination, and by adopting this ambitious but realistic plan, we can build a better NIPSA together – a union ready to secure the best possible future for all members.

9. Conference Decisions Requested (To go to special Delegate Conference)

Conference is asked to:

1. Endorse the NIPSA Transformation Programme 2026–2030 as outlined in this report, including its seven project streams, phased approach, and guiding principles, as the strategic framework for renewing NIPSA.
 - Authorise the General Council to proceed with implementing the Programme, in collaboration with the NIPSA HQ Trade Union Side for all staffing-related changes and with ongoing consultation and involvement of the membership.
2. Mandate regular progress reporting, whereby the General Council will present updates on the Programme to each Annual Delegate Conference through 2029 (and interim updates via member communications), ensuring transparency and allowing Conference to review progress and provide input.
3. Acknowledge that specific proposals arising from the Programme that require formal member approval – such as constitutional amendments or any change to membership subscription structure – will be brought to Conference (or a Special Delegate Conference if appropriate) for debate and decision by the delegates, in line with NIPSA’s rules.
4. Reaffirm that the Transformation Programme’s success depends on active member participation, and encourage all branches and members to engage with the consultations, pilots, and feedback opportunities that will be provided as the Programme is rolled out.

By approving these decisions, Conference will signal collective commitment to the transformative changes needed for our union to thrive, and to doing so in a way that honours our democratic processes and values.