

BUILDING POWER IN THE WORKPLACE



the AFSCME internal organizing manual

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AFSCME Department of Organizing and Field Services

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INTRODUCTION

BUILDING POWER IN THE WORKPLACE

Internal organizing is about strengthening our union and broadening the fight for change in the workplace. Across the country, AFSCME local unions are working to improve the lives of their members and to build their membership. Local unions undertake internal organizing campaigns when they realize that the union just isn't strong enough to win the critical fights. This guide describes best practices that local unions can use to create successful internal organizing drives, and distills those practices into a model that can be adapted to a broad range of situations:

- Open shops
- Agency shops
- Organizing in the absence of collective bargaining
- Fighting to win collective bargaining rights
- Fighting for a new contract
- Building to prevent decertification threats

While AFSCME local unions have a proud history of success, the International Convention in 1998 recognized the need to focus on internal organizing. In turn, the International Executive Board has adopted policies to encourage internal organizing efforts based on proven principles including strategic targeting, worker action, systematic planning, house calls and other one-on-one communications. **Under the AFSCME Internal Organizing Model, increasing worker participation and winning changes in the workplace are the primary objectives.**

Internal organizing is about strengthening our union and broadening the fight for change in the workplace.



Local unions launch internal organizing drives when they conclude that the union isn't strong enough: not strong enough to achieve contract bargaining goals; not strong enough to block privatization; not strong enough to implement changes through the grievance process; and not strong enough to force the employer to make important changes. To win key fights and make real change, local unions need power, and internal organizing is the solution.

Most local leaders instinctively understand that low membership is a sign of weakness. The number of non-members is inversely related to the power of the union. Workers join a union because it is effective, and they refrain from joining if it is not. In turn, getting workers to join the union helps build strength, and getting workers involved in actions is the catalyst that increases power. Workers will only remain members of the union if it is a powerful organization that gets results. Worker mobilization demonstrates that power.

A minority union is a weak union, while an organization that maintains majority membership (or ultimately 100 percent membership) will have power and influence.

Internal organizing is not about selling union membership. It is about fundamentally transforming the workplace and the union. An active union attracts members, and a powerful union keeps members.

A minority union is a weak union, while an organization that maintains majority membership (or ultimately 100 percent membership) will have power and influence. By strategically applying the principles outlined in this guide, we can build organizations with overwhelming membership and achieve real successes in the workplace.

The practices that have proven effective in external organizing campaigns are also effective in internal organizing. Organizing must be a thoughtful and strategic process, where we plan, commit what it takes to accomplish the plan, and evaluate progress through concrete benchmarks. **Most of all, organizing is built on personal relationships, and the best way to build personal relationships is through one-on-one communications.** *That means that the AFSCME Internal Organizing Model is built on house calls — no other form of one-on-one communication has proven more effective.*

Finally, internal organizing drives should be intensive and fast-paced efforts, defined by a real sense of urgency. We must motivate and mobilize workers, confront the boss and accomplish our goals within a reasonable time frame.

INTRODUCTION

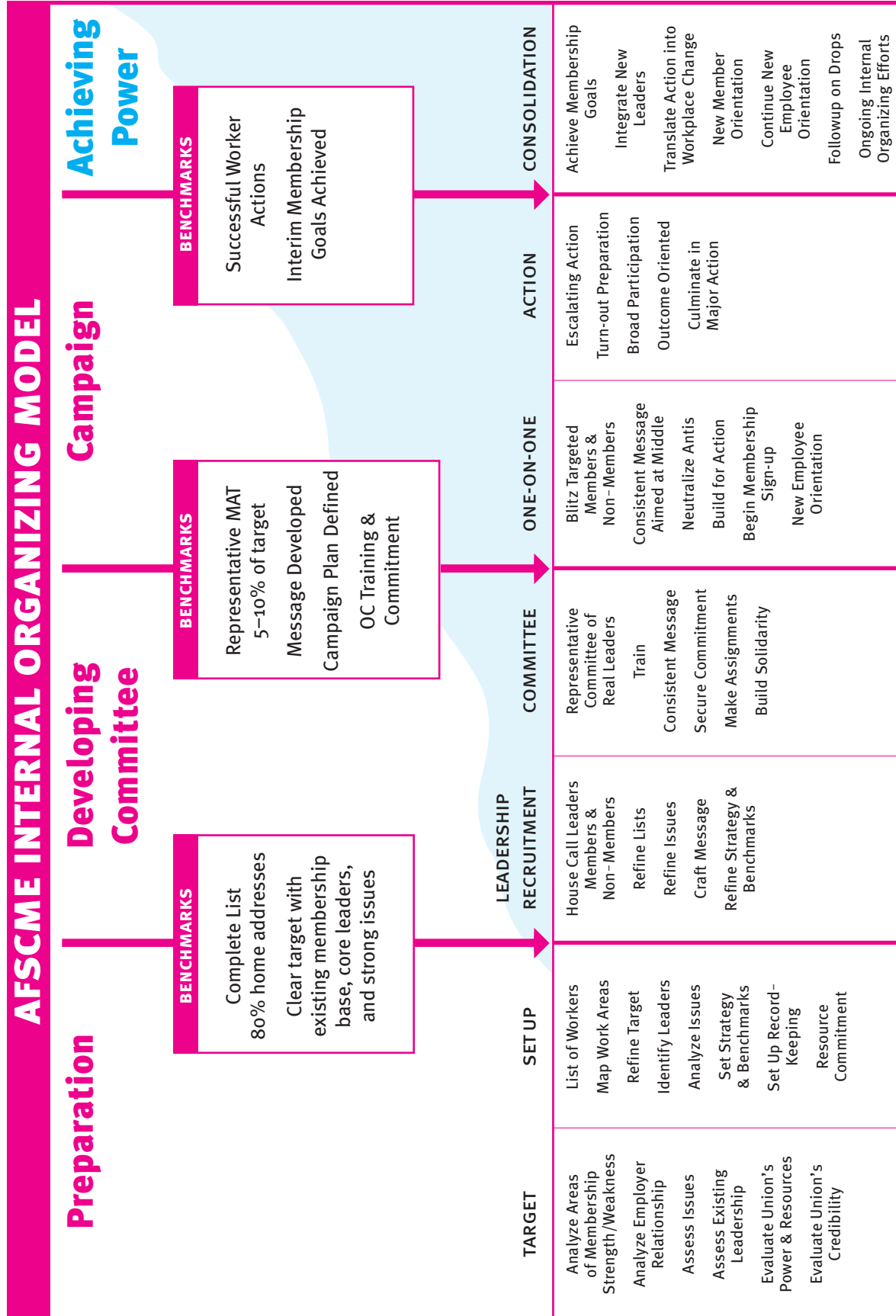
TEN PRINCIPLES FOR BUILDING UNION POWER

The AFSCME Internal Organizing Model is part of AFSCME's effort to clearly define what makes a successful organizing campaign. It joins the *AFSCME Organizing Model and Manual* and *Communicating to Organize — AFSCME's Campaign Message Guide*, which outline how to run and win external organizing drives. *Building Power in the Workplace — The AFSCME Internal Organizing Manual* is based on the following ten principles:

Ten Principles for Building Union Power

1. *Internal organizing targets should be built on an existing base of membership.*
2. *Current leaders must take responsibility for the campaign.*
3. *Campaigns should be driven by systematic one-on-one communications, including house calls.*
4. *A representative organizing committee (Member Action Team), recruited from members and non-members alike, is key to success.*
5. *Campaigns must incorporate worker action around important issues.*
6. *Campaigns must communicate a clear, concise and relevant message.*
7. *Council/local staff must take a participatory role in the campaign.*
8. *Systematic record-keeping and tracking of contacts is crucial.*
9. *Every organizing campaign is different and strategic planning is imperative.*
10. *Strong unions are built on majority membership.*

INTERNAL ORGANIZING MODEL CHART



INTERNAL ORGANIZING MODEL SUMMARY

STEP ONE : TARGETING

Decide whether and where to launch an internal organizing campaign.

- Analyze the membership and obtain employee lists.
- Evaluate the union's credibility and analyze past successes and failures.
- Know the union contract.
- Evaluate the union's resources and build from the union's strengths.
- Know your employer and your relationship with the employer.
- Investigate issues and analyze whether the union can make a difference.
- Identify current leaders that will be involved in the campaign.
- Establish a well-defined target.
- Targets should be best opportunities for success.

STEP TWO : SET UP AND PLAN

Carefully plan the internal organizing campaign before you begin.

- Build a full list of all workers, with home addresses, phone numbers if possible, and specific worksite information.
- Map work areas.
- Develop a sound strategy, a detailed campaign plan and benchmarks for the campaign.
- Establish procedures for record-keeping.
- Identify resources from council and/or local for the campaign.
- Define role and commitment of staff.
- Secure commitment from the leaders to the strategy and benchmarks of the campaign.
- Secure commitments from leaders to a campaign focused on house calls and membership action.
- Evaluate community and other employer pressure points.
- Time your campaign with important events and activities.

INTERNAL ORGANIZING MODEL SUMMARY

STEP THREE : DEVELOP THE ORGANIZING COMMITTEE

Build a representative committee of workers that will accept responsibility for the campaign.

- Identify respected leaders in the workplace, both members and non-members.
- Organize existing leaders to house call other potential workplace leaders to build the committee and identify issues.
- Refine the issues and craft a message from what you know and what you learn during house calls.
- Refine strategy and benchmarks from what you learn.
- Ensure 5-10 percent of the targeted workforce is represented on the committee in a broad range of work locations, job titles, shifts, ethnic groups and genders.
- Improve the list of workers with addresses, phone numbers and other critical information.
- Train the committee and other activists on house calls/one-on-one communication and the campaign plan.
- Secure commitments from the committee to dedicate the time and effort needed to meet goals.
- Make assignments to the committee members.
- Build solidarity.

STEP FOUR : LAUNCH THE CAMPAIGN

With an expanded and trained MAT, we can reach out to all workers through one-on-one contacts.

- Initiate a house-call campaign to members and non-members.
- Listening to workers is the key to effective house calls.
- House calls will help clarify issues, identify additional leaders and lay the groundwork for worker action.
- One-on-one contacts should result in assessments of the worker's likelihood of joining the union and participating in workplace actions.
- Maintain a consistent message that is directed to workers in the "middle," not workers who are already committed to the union.
- Membership sign-up should be a product of worker action, and not the theme of the campaign.
- Use employee orientation to introduce employees to the union.

INTERNAL ORGANIZING MODEL SUMMARY

STEP FIVE : ORGANIZE WORKER ACTIONS

Internal organizing is fighting for change in the workplace by organizing worker actions which increase participation and make meaningful changes in the workplace.

- Campaigns should start with worker actions that have clear and achievable goals and escalate as membership strength is built.
- A strong turnout for worker actions is key to a successful campaign.
- Broad participation ensures that actions can be translated into workplace victories.
- Worker actions should always include a clear strategy to achieve change in the workplace.
- Community and other alliances should be built to support workers and pressure the employer.

STEP SIX : CONSOLIDATING POWER

Once successful worker actions have been executed, the union must work to maintain strength and make the principles of internal organizing part of the culture of the union.

- Achieve membership growth goals.
- Integrate new leaders and members into the union.
- Translate worker action into workplace change.
- Maintain regular one-on-one communications.
- Continue union involvement in new employee orientation programs.
- Workers who drop their membership should be contacted at the home.
- Make internal organizing a continuing priority for the union.

CAMPAIGN PREPARATION

TARGETING | SET UP | PLANNING

The success of internal organizing campaigns will be determined by what we do before the campaign even starts. Targeting must be strategic. Before undertaking a campaign, we must evaluate the union and its environment, at both the council and local level. Virtually every local union can benefit from internal organizing, but not every local union and certainly not every work area is ready for an internal organizing campaign. **Internal organizing targeting decisions must be based on:**

- An analysis of the union's strengths and weaknesses.
- The level of resources that can be devoted to internal organizing.
- The issues of concern to employees and the ability to change the situation.
- The willingness of leaders to accept responsibility for a campaign.

Councils and locals should evaluate and prioritize each potential target for internal organizing. The scope and size of the internal organizing target(s) should correspond to the resources available. The most important resources are the members and leaders who are willing to accept responsibility for a given internal organizing campaign.

Every target chosen for internal organizing should be evaluated against the standard of our ability to achieve real success. If an entire local union or group of locals meets the criteria for success and the resources exist to run the campaign, that's great. More often than not, we will need to choose narrow targets at first. Although there may be resistance to targeting within the local because some workers may feel left out or ignored, targeting is crucial because resources are scarce. After success is achieved in one area, move on to another.

The AFSCME Model is based on targeting work areas where there is an existing base of membership and the existing leadership is willing to accept responsibility for the campaign.

Meeting these two criteria is critical to success. Most local unions who consider internal organizing campaigns do so because they have identified weaknesses, but starting where the union is weakest is a mistake. Each local union, no matter how small, no matter how low their membership, has relative strengths in some work areas. Internal organizing targeting must evaluate those strengths and use them to prioritize resources and concentrate efforts.

Targeting is also about understanding which factors can influence the effectiveness of the campaign, or increase the interest of employees in the union. While the employer controls some factors, many are within the union's control. The timing or scheduling of negotiations, for example, is often a critical factor in planning internal organizing drives. Building an organizing drive around a contract campaign is a natural way to focus your organizing efforts. Likewise, political election cycles, the implementation of pay increases, the threat of privatization, the threat of budget cuts and other employer actions must be evaluated for their impact on our ability to affect change.

Part of the preparation for any campaign is to collect information on the target. The most critical information in any organizing campaign is the list of workers in your target (with home addresses and phone numbers where possible). Employee lists often can be obtained directly from the employer. If address and phone information for non-members cannot be obtained from the employer, one of the first tasks is to get that information from a large majority of people in the targeted group. The AFSCME model recommends getting a minimum of 80 percent of the addresses before proceeding with a campaign.

COLLECTING THE NECESSARY INFORMATION

Building address lists can be done by using the phone book, calling information, using Internet white page services, using commercial data matching services, checking voter registration files, talking to co-workers, collecting informal lists that are available in the worksite (work schedules, time sheets, payroll records, holiday card lists, personal address books), using sign-in sheets at meetings and circulating petitions. **Spending the necessary time to build a good list is critical.**

Several Internet sites can be used to improve your address and phone information, including:

<http://www.yahoo.com>
<http://www.anywho.com>
<http://www.infospace.com>
<http://www.pc411.com>
<http://www.reversephonedirectory.com>

*Internal organizing isn't just about organizing members
—it's about organizing and out-organizing the boss.*

It is also important to research the employer. We must be willing to look beyond the everyday relationship, and find out what pressure points can be used to win battles in the workplace.

Who holds the power and how can they be pressured? We must understand what factors affect the boss' ability to meet our demands. What budget problems exist? What political, ideological or economic interests will cause the employer to resist union actions? How will the boss and the workers react to external pressure? What are the political and community groups that can be used to pressure the employer? How can the press and public opinion be used? Internal organizing isn't just about organizing members — it's about organizing and out-organizing the boss.

CAMPAIGN PREPARATION

PRE-CAMPAIGN PLANNING MEETINGS

A good campaign requires a solid plan based on strategic assumptions shared by campaign leaders. Along with staff, key council and local leaders should set up a meeting to discuss the plan. While local, council and International Union leadership may agree on the need for internal organizing, everyone starts with their own set of assumptions, abilities and past practices. The first step is to review the Internal Organizing Model and discuss how it applies to the local. The ultimate goal of the meeting is to develop a plan for targeting, recruitment of the organizing committee (Member Action Team), commitment of resources and preparation. In doing so, participants should answer the following questions:

- 1. Can the target be refined to work area(s) with a sufficient membership base and core group of leadership?*
- 2. Are there substantive workplace issues that can be affected by the union?*
- 3. How can we develop accurate and complete lists?*
- 4. Does the local union have credibility with workers? What can be done to strengthen the local's credibility?*
- 5. Who are the respected workplace leaders to be recruited for the Member Action Team (MAT)?*
- 6. What resources can the council and local commit?*
- 7. How will employee contacts be tracked and records be maintained?*
- 8. Are the leaders willing to commit to a program of one-on-one communications including house calls?*

The objective of the planning meeting should be to produce a draft of the campaign plan with a time line and concrete benchmarks. The plan should serve as a guideline for the campaign and the benchmarks should be objective standards that determine our readiness to move ahead with the subsequent phases of the campaign. For example, we should set a specific numeric goal for the MAT in the pre-campaign phase. The goal should serve as the benchmark for whether we are ready to begin a wider house-call program and prepare for initial membership actions. We should also set benchmarks for turnout in membership actions so we can measure our readiness to escalate to more significant actions.

It is impossible to foresee all the needs, obstacles and events in the campaign. **We should regularly review the plan, question the original assumptions and revise the plan when necessary.** The issues identified early on may not turn out to be the issues that people care about the most. The boss may react differently than you expect. The lists may not have accurate information. Finally, the original benchmarks may need to be changed.

DEDICATING THE RESOURCES

Local unions must be willing to treat internal organizing as a priority. That means dedicating the time, effort and money needed to make it work. The most important resources are the time and effort of staff and leaders.

Local unions should also be willing to invest financial resources in the things that make a difference in the ability to organize. The local's willingness to dedicate resources also has to be matched by a commitment to spend those resources wisely. First and foremost, resources should be spent to enhance lists, facilitate house calls, support worker actions and conduct employee orientations. Experience tells us that it is easy to spend money on things that have no relationship to success. For example, expenditures on written materials are only helpful if the campaign is built on one-on-one communications. Spending money for a newsletter that does not support the campaign message and contribute to one-on-one communications is a questionable use of organizing resources. Similarly, a local holiday party may be a nice opportunity to socialize, but it makes little sense to spend scarce organizing funds for parties or general meetings that are not directly tied to actions around important workplace issues. Locals should also avoid the temptation to provide signing bonuses to increase membership. While we often hear stories about the effectiveness of such incentives, they lose their effectiveness rapidly and do nothing to build strength in the local.

*The most important resources are the time
and effort of staff and leaders.*



DEVELOPING THE MEMBER ACTION TEAM (MAT)

RECRUITING A REPRESENTATIVE COMMITTEE

Recruiting the right people for the Member Action Team is the best way to get an effective campaign off the ground. It is critical that the MAT be representative of the employees in the targeted segment of the workplace. The most common mistake in an internal organizing campaign is to assume that a small group of local leaders will be sufficient to serve as the Member Action Team.

As part of the planning process, we must develop a list of natural workplace leaders to target for MAT recruitment. This list should include officers, stewards, members and non-members alike. The primary criteria for recruitment should be to identify respected workers from all major work areas, shifts and employee groups. Recruiting the Member Action Team should be thought of as part of the pre-campaign planning – we aren't ready to start a real campaign until much of this work has been completed.

What Makes a Leader?

- *Well respected and liked by co-workers.*
- *Effective worker on the job.*
- *Knows a lot of co-workers.*
- *Willing to commit time to causes they believe in.*
- *Effective communicator.*
- *Able to move other workers to action.*

Don't assume that we know what is important to others — listen and learn.



HOUSE CALLING POTENTIAL LEADERS

The best way to recruit new workers to the Member Action Team is to have one-on-one conversations about workplace issues of personal importance. Don't assume that we know what is important to others — listen and learn. By house calling potential leaders, we can find people who care about workplace issues and are willing to get involved to solve them.

There are five mutually compatible goals that can be accomplished by initial house calls: (1) increase the size of the MAT; (2) find out what issues are really important to workers; (3) improve your list; (4) get leads for additional home visits; and (5) educate workers about the union.

Outline for an Effective House Call to Recruit Leaders

- *Introduce yourself.*
- *Listen to workers talk about their concerns.*
- *Assess workers' leadership abilities.*
- *Educate workers about the union and the importance of their participation.*
- *Ask non-members to join the union.*
- *Seek commitment to participate in specific ways.*
- *Gather information on other potential leaders.*

Worker Activity Ladder

Successful campaigns are built around a core of active workers who take ownership of the union and the campaign. Recruiting and developing activists is a critical component of an organizer's job. The following steps show a typical progression as workers become bolder and more seasoned union leaders:

- Step 1.** Provides information.
- Step 2.** Joins the union.
- Step 3.** Takes part in actions.
- Step 4.** Recruits others to take part in actions.
- Step 5.** Consistently works to help build the union in the workplace.
- Step 6.** Defends the union to the employer.
- Step 7.** Represents the union to the public.

DEVELOPING THE MEMBER ACTION TEAM

HOW MANY LEADERS ARE NEEDED FOR A REPRESENTATIVE MAT?

The AFSCME Internal Organizing Model and the AFSCME External Organizing Model are built on the premise that a representative committee must incorporate leaders from all major work areas, shifts, and social, racial and ethnic groups. An organizing committee of 10 to 15 percent of the targeted work area(s) is needed when organizing new bargaining units. According to AFL–CIO organizing surveys, the most significant factor leading to union success in external organizing elections is an effective and representative committee. When an effective committee is in place, unions win 62 percent of the representation elections. When it isn't, unions win a mere 10 percent of the time.

The AFSCME Internal Organizing Model calls upon locals to build a MAT of 5 to 10 percent before launching the campaign.

While internal organizing is in some ways different from external organizing, the same principle applies. Large committees are needed so that there is a one-to-one network throughout the workplace. With a small committee, it is impossible for each person on the committee to have regular meaningful contact with each worker in their assigned area. In internal organizing, we need to be realistic and honest with ourselves about our ability to quickly create Member Action Teams of 10 to 15 percent of the workforce. Local unions probably wouldn't need an internal organizing campaign if a sizable group of leaders already existed, and building an organizing committee where there is a history of weakness is a difficult process. The AFSCME Internal Organizing Model calls upon locals to build a MAT of 5 to 10 percent before launching the campaign. The model recognizes that a committee of 5 percent is small. Therefore, it is critical to focus on expanding the committee during the campaign. Does that mean we can't undertake an internal organizing campaign without a representative committee of 5 to 10 percent of the target? There is no simple answer. Conditions in a local union may be ripe for organizing, and a decision to start while we build the committee may be best under those circumstances. It may be better to start in a smaller work area, where we can come closer to achieving a representative committee. Or, it may be better to take the extra time to build the MAT further before we start. Each campaign should be evaluated on its own merits and needs.

What does a Member Action Team do?

- Lead their co-workers in workplace actions.
 - Help recruit additional MAT members.
 - Take responsibility for personally communicating to a specific work group and specific workers.
 - Distribute literature and other material to workers.
 - Mobilize workers and track turnout for worksite actions.
 - Communicate the concerns of workers to MAT members and union leaders.
 - Sign up new members.
-

INTEGRATING THE STEWARD STRUCTURE INTO THE CAMPAIGN

Stewards must be a part of the organizing drive, and are often the most obvious choices for recruitment to the MAT. But the role of the stewards and members of the team are different. Effective stewards represent workers in the grievance process, and use organizing techniques to mobilize membership and look for opportunities to build the union. Some stewards may be natural organizers, while others may struggle with one-on-one communications and moving people to action. Similarly, some MAT members may be turned off by grievances and not want to be stewards. The point is to look for a team that is beyond the current steward structure.

In addition to evaluating the participation of stewards in the MAT, consider how the actions of the stewards affect the organizing drive. Organizing is about mobilizing large numbers of workers around issues of broad appeal, while many grievances are about the problems of an individual. In organizing drive, both MAT members and stewards should be looking for issues to advance organizing. They should consider the grievance procedure as one of many tools to resolve problems. Stewards should also look for ways to expand individual grievances into issues of broad appeal.

Group grievances can often be great vehicles for organizing. At the same time, the grievance procedure can actually inhibit worker involvement and mobilization if it is pursued in a vacuum. By nature, grievance procedures are process-oriented, not worker-oriented. The trick is to turn that around. Grievances should be evaluated by asking the following questions:

- *Does the grievance involve workplace issues of broad appeal?*
- *Can the grievance be turned into a group grievance?*
- *How can workers be mobilized around the grievance and involved in the process?*
- *Is the union able to win the grievance or affect positive change in the workplace?*

Organizing is about mobilizing around issues of broad appeal, while many grievances are about the problems of an individual.



DEVELOPING THE MEMBER ACTION TEAM

TRAINING THE NEW MEMBER ACTION TEAM

House calling and recruiting leaders builds the Member Action Team and helps refine the organizing plan. Once the initial house calls have been completed and an expanded MAT has been recruited, it is time to bring the entire MAT together for training. The training should cover campaign plans, goals, benchmarks and, most importantly, house-calling techniques. Providing good training enables us to hit the ground running and begin to build the camaraderie needed for a strong Member Action Team.

The most important part of the training is role playing house calls. Many members have no previous experience and may be uncomfortable or even reluctant to do house calls.

*The most important part of the training
is role playing house calls.*

The Member Action Team training should also serve as the group's first meeting. We should discuss workplace issues, the central message of the campaign, and build a consensus around the organizing plan. By the conclusion of the training, it is important to gain the personal commitment of MAT members to the campaign. MAT members should be asked to take specific assignment and lists the workers they will contact. Established leaders should set the tone by explaining their own commitment.

Agenda for Member Action Team Training

1. Introductions.
2. Presentation on AFSCME Internal Organizing Model.
3. Discussion of issues.
4. Discussion of campaign message.
5. Discussion of goals and benchmarks.
6. One-on-one house-call training.
7. Individual commitments.
8. Specific assignments.

A whole lot of work has been done to reach this point, yet the heart of the campaign has not yet begun. In preparation for the campaign, we established the Member Action Team, developed the plan, refined the message and trained the MAT members. Now is the time to reach out to the rest of the workers.

In an internal organizing campaign, a key test of support is whether a non-member signs a dues deduction card.

Listening to workers is a continuous process. Regardless of how much time has been spent listening and developing our message, we are never finished. Every worker has their own issues. **One-on-one contacts are an opportunity to discover what issues are of importance to each worker and to test our message.** One-on-ones are also an opportunity to move the worker to action and assess their support for the union.

Sample House-Call Outline

1. Introduce yourself.
2. Listen to the worker's experiences and concerns.
3. Educate the worker about the union and employer.
4. Assess the worker's support.
5. Move the worker to action.
6. Ask non-members to become members.

PREPARING FOR AND TRACKING HOUSE CALLS

Good record-keeping saves more time than it takes and is vital to an effective organizing drive. Preparation for house calls starts with building a good list including home addresses. Time spent finding accurate home addresses reduces time wasted visiting bad addresses. Similarly, spending time mapping and preparing house-call routes reduces time wasted driving around neighborhoods. Time spent recording the results of your house calls saves time for future contacts and helps to direct future organizing activity.

In an internal organizing campaign, a key test of support is whether a non-member signs a dues deduction card. It is important to keep track of who has joined as well as who hasn't joined and why. The AFSCME Model calls for the use of a simple rating system for all contacts. When making one-on-one contacts, we should assess the worker's support and willingness to participate in union actions. We must also keep track of the specific reasons why the worker did not join.

KICKING OFF THE CAMPAIGN

HOUSE-CALL TIPS

- **Wear appropriate clothes.** Don't wear clothing that calls attention to you or makes the worker feel uncomfortable. Clothes that are too fancy or too casual can make a bad first impression that is hard to overcome.
- **Plan your route in advance.** Use a mapping computer program or an up-to-date street map and plot your route so you are not wasting time, but are visiting people in a logical order.
- **Use your time effectively.** Don't take meal breaks during prime house-calling hours. Know what shifts people work and/or if they work other jobs. Visit from the end of the shift until as late as possible. Saturdays and Sundays after church are very good times to house call.
- **Don't call ahead.**
- **Try to make the visit last 30-40 minutes.** Have a clear agenda and goal in mind for each worker you visit.
- **Bring a committee person or another worker with you.** But don't put off house calling if a worker can't accompany you.
- **Let the worker do most of the talking.** You're not a salesperson—draw people out with open-ended questions. You are developing a relationship and moving the worker to action.
- **Don't assume anything.** Ask questions and listen.
- **Be honest.** If you don't know something, tell the person you will find out and get back to them (and make sure you do!).
- **Don't argue.** Look for common ground. Winning an argument won't do any good.
- **Involve a worker's family members.**
- **Fill out a house-call report form.** You should do this immediately after leaving the house, but drive far enough away so you aren't sitting out in front filling out a form.
- **Only provide literature at the end of the visit, if at all.** If the person isn't home, don't leave literature and return another time.

AFSCME INTERNAL ORGANIZING RATING SYSTEM

When assessing support for the union, use the following scale to code workers.

- | | | |
|----|---------------------------------------|---|
| 1. | ACTIVE | <i>Regularly participates in union actions and is a member.</i> |
| 2. | SUPPORTER | <i>Existing or new member who does not participate in union actions or has not yet been assessed with respect to participation.</i> |
| 3. | PERSUADABLE | <i>Has been contacted, but hasn't signed a card. May be interested in some union issues, may orally support the union at times, may be skeptical about union motives or ability to deliver, may voice some anti-union sentiments.</i> |
| 4. | ANTI-UNION | <i>Strongly anti-union or opposed to joining the union. Will not participate in union actions.</i> |
| 0. | UNKNOWN /
INSUFFICIENT INFORMATION | <i>Non-member who has not been contacted or fully assessed.</i> |

The purpose of rating workers is to help identify the most likely supporters to recruit for organizing activities. In an external organizing election campaign, one of the objectives of the rating system is to focus on turning out union supporters to vote. Internal organizing is not about an election where there are winners and losers – it involves building majority support and unifying workers, first by transforming a minority into a majority, and then by reaching as close to 100 percent as possible.

The initial house calls should also include a tool to begin the process of moving workers to action and to show that the union is interested in important workplace issues, not just dues dollars. For example, a petition to the boss encourages workers to take a public stand and helps test a non-member's interest in the union. A worker who won't join the union but will sign a union petition is a good prospect for future membership. You may want to distribute contract surveys to help identify issues, show that the union is interested in worker participation and help to prioritize issues. Getting worker commitments to help distribute literature, collect surveys, get involved in negotiations or put their name and picture on union literature, all help to identify supporters and increase worker commitment.

COUNCIL / LOCAL STAFF AND HOUSE CALLS

House calls are not just for the Member Action Team and full-time organizers. Council and local service staff must be involved in every facet of the campaign, including house calls. Staff cannot fully appreciate the issues and dynamics of the campaign without personally participating in house calls.

KICKING OFF THE CAMPAIGN

DEBRIEFING HOUSE CALLERS

When multiple staff and leaders participate in a house-call effort, it is important to debrief after each session of house calls. Debriefing is the systematic analysis of every house call. The debriefing process has two primary functions: (1) ensure detailed information is accurately collected; and (2) provide feedback to house callers on their techniques. Debriefing should take place immediately after the house call (if the lead organizer is riding with the house caller) or at the end of the day. The lead organizer should question the house callers about each worker they visited, concerning their issues, their support, their willingness to participate in actions and their leadership potential. The lead organizer should also ask how the house caller felt about their own performance. Were they comfortable? Did they ask the right follow-up questions? Did they listen enough? What did they do well? What would they do differently?

Debriefing is the systematic analysis of every house call.

Debriefing is indispensable if the lead organizer really wants to understand the workers in the campaign and build the skills of the Member Action Team. How the debriefing is conducted will affect how well activists conduct house calls, as well as their willingness to do more. The debriefing process should encourage and motivate house callers.

MOVING THE MIDDLE

In order to build majority support for the union, we must organize around issues that appeal to the undecided and persuadable workers in the “middle.” Organizing campaigns that appeal to the most militant union members will alienate the workers you are targeting. But don’t confuse emphasizing issues that appeal to the center with timidity. By its very nature, worker action is militant. It is a fight for change. Playing to the middle does not mean avoiding a fight — it does mean fighting effectively about issues with broad appeal. It also means making sure that the workers in the middle are with us. The union will be marginalized if workers and the boss believe it only has the support of “radical” unionists, even if it acts on issues with broad appeal. Focusing on the middle means understanding that local union leaders, members and non-members have different viewpoints. The goal is to devise strategic plans that bring together both members and non-members to create a majority union.

It is important to make sure that membership actions as well as the message appeal to the middle. Don’t use overly aggressive actions if the majority of workers aren’t ready. Start with actions that a majority of workers find comfortable. As participation increases, we can intensify the militancy of our actions.

Big changes are not made overnight. That's why we must build support for worker action, and demonstrate the ability to carry out effective actions in order to build that support. If we start with a difficult action that requires a high level of commitment and we fail to achieve our goals, the action will hurt our ability to undertake actions in the future. Therefore, the first actions should be limited to what can reliably be achieved. For example, if there is weak support in a work area we should not test our strength with an initial action that requires a majority turnout for a direct confrontation with the boss. Each action should be based on issues people care about or should be built on previous actions. This will raise the level of awareness and confidence in the union.

An example of escalating membership action at the University of California

1. *Health care workers at UCLA hear reports that Unit Service Assistant positions will either be transferred to another department or eliminated entirely.*
2. *Member Action Team circulates petition signed by over 100 Unit Service Assistants.*
3. *Member Action Team delivers petition to management.*
4. *Large group of workers meet with management to demand that the jobs stay in Nursing Department.*
5. *Workers win management commitment to keep jobs in Nursing Department.*

We must build support for worker action, and demonstrate the ability to carry out effective actions in order to build that support.



ORGANIZING WORKER ACTIONS

TURNOUT FOR WORKER ACTIONS

There is no more basic organizing skill than the ability to turn out workers to a meeting, action, rally or other event. Achieving a good turnout is the single most important component of a successful event. The old organizing wisdom that “turnout is 90 percent of an event” is true.

Good turnout depends on planning, communicating a clear vision and hard work. The vision connects people to the event and the hard work gets them there. Planning involves all members of the MAT agreeing on the level of turnout needed and how to reach that goal. Each MAT member must have their own goal and each MAT member should be able to list by name who they intend to turn out. The event shouldn’t go forward unless you know that the turnout goal can be met. Remember, people come to an event because someone they know asks them to come. Don’t rely on leaflets. Leaflets don’t move workers – workers do.

We must gain personal commitments from workers to attend the event. A commitment is not an “I will try” – it is a firm “I will.” Don’t rely on assumptions about an individual’s intentions, or claims that a worker will bring a certain number of other workers with them, unless they have specific names and commitments. Effective turnout is a one-on-one process where workers make concrete commitments.

Good turnout also depends on a systematic effort. Be relentless. Contact every supporter and potential supporter. Everyone who has committed to attend should be reminded at least twice before the event, including the night before. Every event involves cancellations and no shows. Don’t be fooled into thinking that this event is any different. That’s why it’s important to make sure we have twice the number of commitments needed to reach the turnout goal.

Tips for Turnout:

- *Devote more time to turnout than preparing for the event itself.*
- *Great turnout is what makes a great event. Poor turnout will kill an event and maybe even the campaign.*
- *Pick your meeting space carefully to match your turnout. Nothing is worse than a small group in a huge room.*
- *The more people you can involve in the turnout effort, the better.*
- *Spend time teaching MAT members about how to produce a great turnout.*

CREATING URGENCY

SAMPLE CAMPAIGN TIMELINE

Sample Campaign Timeline & Benchmarks (First 60 days)

8/3/00	8/21/00	8/25/00	9/15/00	9/18/00	9/30/00	10/2/00
PLANNING MEETING	COMPLETE INITIAL MAT RECRUITMENT	MAT TRAINING				
		HOUSE-CALL KICKOFF	100 HOUSE CALLS COMPLETED		150 HOUSE CALLS COMPLETED	
			50 NEW MEMBERS	75 NEW MEMBERS	100 NEW MEMBERS	
			200 SIGNATURES	MAT TO SUBMIT PETITION START TURNOUT PLAN FOR WORKER ACTION	CONFIRM TURNOUT	WORKER ACTION ON FORCED OVERTIME

For a deadline to become important, it must be communicated to the others.



Building community support should be an ongoing activity of the local union. Drumming up support when we face a crisis is too late. The best way to ensure that we have allies is to develop alliances built on mutual interests. Community groups, politicians, religious leaders and others are much more likely to help us if we have a history of working together. Take the time to identify what relationships already exist between members and other community groups. Identify other groups and build relationships early. Get involved in their actions. Make sure that members who belong to other groups talk up the union inside those groups.

When developing a community action strategy, identify pressure points on the employer and where the union has influence. Each local union has connections to the community through its members. Our members are active in their communities, from churches to political parties, community organizations and more. We may have members who live next to or socialize with local politicians. They may know people on the board of directors of the employer. They may be involved in groups with influence over the boss. The point is to think strategically about those who can influence the boss and what our relationships are with these people and institutions.

Most importantly, remember that building community alliances is organizing, and organizing requires building personal relationships through one-on-one contacts. Just as there are goals for one-on-one contacts in the worksite, there should be goals and timetables for one-on-one contacts with community, political and religious leaders.

Building community support takes time and focus. Make use of all membership and institutional contacts, and make sure that one person coordinates the effort. If everyone is responsible, no one is responsible.

Each local union has connections to the community through its members.



CONSOLIDATING POWER

When planning an internal organizing drive, the goal is to identify one or more key issues that the union can change. Escalating worker actions are used to build power for that change. When we run successful actions, we are in a position to make meaningful change in the workplace and reach our membership goals.

Once real change is achieved and membership grows, the union faces continuing challenges to maintain power. Organizing brings new members and leaders into the union. To maintain solidarity, they must be integrated into both the union's culture and organization. Workers who have proven themselves as leaders during the organizing drive should be encouraged to continue to participate in the local union's structure. Members whose views were solicited and whose problems became issues in the organizing drive should continue to be sought out.

INTEGRATING NEW LEADERS INTO THE LOCAL UNION

A local union which has achieved significant growth during an organizing campaign often experiences a period of adjustment when new leaders are looking to play a meaningful role in the local union. This can lead to competition between new and old leaders. There are no local unions who do not benefit from the involvement of more members in the local. If we recognize this fact, we will create opportunities for continued involvement of new leaders. It is critical to recognize that organizing is an ongoing process. Just because we have successfully concluded negotiations or won a major workplace victory does not mean that the organizing campaign is over. **We should continuously look for new issues to resolve and new ways to involve members.** The best way to integrate new leaders is to keep them organizing and create meaningful roles for them to fill. The key is to welcome new leaders and give them opportunities to contribute. For example, we may choose to increase the number of stewards, create new officers or involve members as volunteer organizers on AFSCME external organizing campaigns in our area.

CONTINUING ONE-ON-ONE CONTACTS AND OTHER COMMUNICATIONS

To maintain an aggressive one-on-one contact program, establish clear goals for continuing member and non-member contacts. The Member Action Team should become a permanent part of the local union. Through the Member Action Team, we can identify priorities and set goals. Only by sustained organizing can we maintain the power built during the organizing drive. Start by seeking feedback on recent worker actions or making sure that every new member is contacted through a house call. Find out why they joined, make sure that they understand the union and how they can participate. Also make sure there is a continuing communications program, including newsletters and other written materials.

NEW EMPLOYEE ORIENTATION AND OTHER TYPES OF WORKER CONTACTS

While house calls are the most effective form of one-on-one contact, the union should look for additional opportunities to talk to workers. One of the best ways to do so is to use the union contract to provide the union with access to workers during work time. Access to new employee orientation sessions should be part of every union contract. The best contract language guarantees that the union will have its own time to orient new employees. For example, the AFSCME contract for Indiana state employees provides that every employee will receive an individual 30-minute orientation (one-on-one) by the union. (See the Appendix C for sample contract language on employee orientation.) Have a strategy for either winning or improving access rights through employee orientation or other means. Some locals have also been successful in winning the right to have individual meetings on work time to explain new contract provisions.

Sample Agenda for New Employee Orientation

1. *Introductions.*
2. *Overview of AFSCME.*
3. *Highlights of the contract and major victories.*
4. *Current goals and upcoming actions.*
5. *Union structure and dues.*
6. *Asking new workers to join.*

Where we do not have contractual orientation rights, make use of our access to the workplace, including break rooms and public areas near the worksite to talk to workers. The key to successful communications is to get the opportunity for a direct, personal conversation with each worker.

FOLLOWING UP ON THOSE WHO DROP OUT OF THE UNION

Every member who drops out of the union does so for a reason. Sometimes a worker resigns, retires, is promoted or is taken out of the bargaining unit for some reason. Other times a worker has a specific grievance or concern about the union. Immediate one-on-one contact is the most effective way to maintain union membership. With these contacts, we can save that member, and react quickly to issues that could cause multiple drops. The quicker we talk to a worker and address their concerns, the more likely we are to change their mind.

UNION SECURITY — AGENCY SHOP OR FAIR SHARE

There are two types of internal organizing drives in locals which have union security arrangements: those designed to gain union security, and those designed to build power and reduce the number of fee payers when union security is in force.

When there are union security provisions, all workers in the unit either pay dues or are fee-paying non-members. Under these circumstances, local unions sometimes overlook the need for internal organizing. Internal organizing may simply be viewed as a way for locals without agency shop or fair share to sign up members. In reality, internal organizing serves an important function in union security situations. Internal organizing campaigns build power for contract negotiations, help stop threats such as privatization, help avert the threat of decertification and reduce the proportion of fee payers to dues payers.

An election campaign adds a new dimension to an internal organizing campaign.

In campaigns to gain union security, it may be necessary to raise membership to a threshold level (such as 50 percent, depending on the law or the collective bargaining agreement), or it may be necessary to win an authorization election. An election campaign adds a new dimension to an internal organizing campaign.

ASSESSING SUPPORT IN UNION SECURITY ELECTIONS

In any organizing campaign, one-on-one contacts should result in an assessment of the workers' support for the union. Earlier in this guide, we discussed a rating system for these assessments. A different system must be used for union security elections. Every worker in the unit should be contacted one-on-one for an assessment. Assessments should be part of the evaluation process, but should not be the sole reason for the visit. (All the principles of listening and moving to action in home visits still apply.)

Union Security Voter Assessment System

1. *Supports union security.*
2. *Persuadable.*
3. *Against.*

GET-OUT-THE-VOTE FOR UNION SECURITY ELECTIONS

Union security elections also require systematic tracking of supporters for the election. Systems should be set up to record support according to the rating system and make sure that every supporter votes. The principle of GOTV is to maximize turnout of supporters, so that union supporters vote in higher numbers than other workers. We must assess enough voters to win the election and concentrate GOTV efforts on identified supporters.

For a more complete explanation of GOTV efforts read *The AFSCME Organizing Model and Manual*.

Components of a GOTV Plan

1. *Identify support.*
2. *Confirm work schedules of supporters.*
3. *Check for planned absences.*
4. *Locate all supporters who will not work on site where the election will be held.*
5. *Educate MAT on election rules.*
6. *Establish transportation plans for those who need rides.*
7. *Establish contingency plans for unknown absences and assignments.*
8. *Establish plan for making sure that every single supporter votes.*
 - A. *Visibility plan*
 - B. *Phone bank plan*
 - C. *One-on-one and MAT assignments*
 - D. *Written voting instructions and notification to supporters*
9. *Establish communications plan for MAT to confirm that supporters voted.*

The principle of GOTV is to maximize turnout of supporters, so that union supporters vote in higher numbers than other workers.



APPENDIX A.

INFORMATION REQUIRED FOR PRE-CAMPAIGN PLANNING MEETING

This worksheet should be completed by the council/local prior to the planning meeting to help prepare and focus discussions.

LOCAL: _____ WORK LOCATION/AREA: _____

I. THE EMPLOYEES:

1. # OF NON-MEMBERS: _____

2. # OF AFSCME MEMBERS: _____

3. Attach list of employees with available information on home address, phone, work location, work phone, shift, membership status, bargaining unit, sorted by location and shift if possible.

4. Are there concentrations of non-members in certain work areas, shifts of other groups (for example, older employees, workers who work under a certain supervisor, ethnic groups, workers who share a carpool, etc.)?

GROUP:	# OF EMPLOYEES:	# OF MEMBERS:
A: _____	_____	_____
B: _____	_____	_____
C: _____	_____	_____
D: _____	_____	_____
E: _____	_____	_____

II. THE MANAGEMENT:

1. In this area, what is the attitude of management toward the union? Be as specific as you can; this is a very important element to analyze. Do they intimidate people either openly or subtly? Are employees really afraid to join the union?

III. PROBLEMS/ISSUES:

1. List the major job problems or issues faced by employees for the work area / location.

A: _____

B: _____

C: _____

D: _____

E: _____

2. Has anything ever been done about these problems? Why didn't it work?

IV. THE UNION:

1. Attach list of active stewards, including work area and shift.

2. Attach list of local officers and MAT members.

3. Attach list of leaders/members willing to serve on Member Action Team,
including work area and shift.

4. When does/did contract expire?

5. List council/local staff assigned:

APPENDIX B.

SAMPLE CONTACT/HOUSE CALL SHEET

NAME:	_____									
	ETHNICITY:	_____	RACE:	_____	GENDER:	_____	AGE:	_____		
HOME ADDRESS:	_____									

PHONE:	_____									
WORK AREA:	_____			WORK PHONE:	_____					
TITLE:	_____			DEPARTMENT:	_____					
SHIFT:	_____			SUPERVISOR:	_____					
OBJECTIVE OF VISIT:	_____									

ISSUES:	_____									

LEADER/MAT EVALUATION:	_____									

FOLLOW-UP NEEDED:	_____									

OTHER COMMENTS:	_____									

RATING:	1	<input type="checkbox"/>	2	<input type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	Ø	<input type="checkbox"/>
MEMBER:	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>						
CARD SIGNED:	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>						
MAT MEMBER/ORGANIZER:	_____					DATE	_____			

SAMPLE CONTRACT LANGUAGE ON NEW EMPLOYEE ORIENTATION

AFSCME INDIANA COUNCIL 62

**ARTICLE 8
UNION ORIENTATION**

Section A. Where an orientation program, formal or informal, is conducted for new employees in units covered by this Settlement, the local union president, or designee, shall receive advance notice and be afforded the opportunity to make a presentation, respond to questions and distribute a packet of informational material approved by the State Personnel Director or the Director's designee.

In the event that notification is not given, or an orientation is not conducted, the local union president or designee, shall be afforded an alternative opportunity to meet with the new employee(s) on an individual basis in accordance with Section C below.

Section B. The State will include in the packet of personnel and payroll forms provided to new employees, in the units covered by this Settlement, Union membership, dues authorization and representational fee card(s). Any Union materials that require the employee's signature shall be returned to the Union by the State upon completion.

Section C. The Union shall be allowed to conduct a meeting to orient, educate and update each employee in the units covered by this Settlement for 30 minutes for each year covered by the term of the Settlement.

Such meetings shall be for the purpose of informing employees of Union membership programs and their rights and obligations under the Settlement.

They shall be conducted during the employee's schedule, work time and at the work location. Employees shall be required to verify the opportunity to participate with their signature at the meetings, however, continued attendance at such meetings shall be voluntary and without loss of pay for the employees.

The time and place of such presentation will be mutually agreed upon by the Local Union President or designee and the Appointing Authority or designee.

APPENDIX C.

SAMPLE CONTRACT LANGUAGE ON NEW EMPLOYEE ORIENTATION

AFSCME MARYLAND COUNCIL 92

(ECONOMIC ISSUES)

SECTION 9. NEW EMPLOYEE ORIENTATION

The Employer will notify the Union of formal orientation meetings. The Union will be advised of the time and location of orientation meetings as soon as such meetings are scheduled.

In the event a formal orientation meeting is not given, the Employer shall allow the Union representative and the employee(s) to meet during duty hours at a mutually agreed to later time for twenty (20) minutes. At the conclusion of all formal orientations, the Union will be permitted to give a twenty (20) minute presentation which may include an enrollment in supplemental Union benefits.

MEMORANDUM OF UNDERSTANDING #2
NEW EMPLOYEE ORIENTATION

The following represents an agreement reached between the State of Iowa and the American Federation of State, County and Municipal Employees (AFSCME).

One representative of the local Union shall be granted up to thirty (30) minutes for Union orientation during the formal orientation for new employees either as a group or with individuals.

Where the Employer does not have a formal orientation program, the Employer will notify the Local Union President/Chapter Chair that a new employee(s) has been hired.

The employer will allow, as the Union may elect, either up to thirty (30) minutes for Union orientation with a new employee to be scheduled by the Employer within thirty (30) days of the date of hire, or the distribution to new employees represented by the Union a packet of information material furnished to the Employer by the local Union.

The Employer retains the right to review materials provided for new employees by the Union and refuse to distribute any political campaign literature or material detrimental to the Employer.

The thirty (30) minute Union orientation shall be voluntary and without loss of pay for the new employee(s).

The Union representative shall be in pay status for the thirty (30) minute Union orientation only if the representative is on duty at the time the orientation is presented.

No local Union representative shall receive overtime, call-back pay, etc., for participating in the employee orientation program while off duty.

APPENDIX D.

EXAMPLE OF CAMPAIGN PLANNING AND WORKPLACE ACTION MATERIALS FROM THE UNIVERSITY OF CALIFORNIA

March 27, 2000

TO: Jim Schmitz, Director, Department of Organizing and Field Services

FROM: Bob Lawson, Regional Director, AFSCME Western Region

RE: AFSCME UC Contract Campaign Update

Attached are: outline of goals, plans, etc.; flyers and news clips from recent actions; packet passed out to legislators at our counter-Lobby Day.

Here is brief summary of where we are organizationally:

UC San Diego

- 60 new members
- 278 contacts
- 12 stewards
- 10 activists/point people (includes stewards and activists)
- 50 point people (includes stewards and activists) — lower level commitment than activists, but hand out literature and signup new members
- see attached flyers for some of their mini campaigns

UC Davis/Sacramento

- 55 new members
- 500 assessments
- talked to 750 people
- leadership training for activists at several worksites
- no real mini campaigns
- will be opening new office this week

UCLA

- 1,900 people accounted for in terms of exact work location (of about 4,000)
- 32 are on “Organizing Committee” — i.e., MAT members
- 16 potential O.C. members – lower-level activists
- 200 new members
- see attached flyers for mini campaigns — contracting out laundry is main campaign (see below)
- biggest action — 40 employees leafleting campus in support of laundry workers (20 from laundry, 20 from other departments)

UC Irvine

- 151 new members
- 150 contacts recorded
- 150 assessments
- 33 service unit leaders who are circulating bargaining survey on campus and hospital
- Mini campaigns — patient escorts (Director of hospital met with them and agreed to job audit after all patient escorts confronted supervisor and labor relations); Patient Financial Customer Service Unit (after series of actions supervisor was removed); security guards (timetable from management on new training and equipment); several other departments working up nerve for mini campaigns

UC San Francisco

- 50 new members
- 600 contacts
- 25 leaders identified, 13 of them tested for consistent work
- Campaigns:
 1. *UCSF/Stanford de-merger mess involved a fight to restore full retirement benefits.* After 3 months of stalling, it appears that UC officials are finally moving to protect retirement benefits for workers caught in the merger mess. The fight was led by Local 829 members; our team helped organize a multi-union picket/rally in front of the hospital on March 9th, and organized a rally and speakers at the March 15th Regents meeting in San Francisco. We helped get media coverage at both.

APPENDIX D.

EXAMPLE OF CAMPAIGN PLANNING AND WORKPLACE ACTION MATERIALS FROM THE UNIVERSITY OF CALIFORNIA

2. *The Renal (kidney dialysis) Center at San Francisco General Hospital had a fight over subcontracting.* It looks like we have won the first round in this fight to stop the sale of a public dialysis center to a private, for-profit corporation. Patients and other workers (nurses, social workers) were mobilized in this fight that few thought we could win.

Workers were initially angry because they felt abandoned and ignored by AFSCME. Several union leaders have now emerged from this fight that involved building alliances with the Mayor's office, County Supervisors, State Assembly and Senate members, and community health care advocates. The fight's not over yet, but UC has abandoned plans to sell the center for the time being.

3. *X-ray techs got organized after new jobs were being filled without being posted.* The manager at first refused to post, so workers came up with a petition that was signed by everyone in their department. The manager has promised that all future positions will be posted.

4. *Parking Garage workers have been meeting to deal with a difficult supervisor.* The workers have had several meetings with both Clarence Johnson and Barbara Donaldson (the campus chapter president).

This campaign is temporarily on "hold" until an EEOC complaint is resolved at the request of workers.

UC Berkeley

- 50 new members (17 have yet to be turned in)
 - 200 contacts
 - 6 new leaders identified
 - Campaigns:
1. *International House custodians organized their own rank-and-file action to get rid of a bad supervisor.* They heard how the USAs at UCLA had marched on their boss and made demands. Without further help, they organized their own action, confronted management, and had their abusive supervisor suspended in less than 20 minutes.
2. *Campus custodians are organizing against management's plan to change their pay periods.* With their low pay, workers say they can't get through the month on one check instead of two. The proposed change sparked eight rank-and-file meetings with workers from every major location on campus.
-

3. *A group of 60 decided to take action on March 14 by marching through the middle of campus to confront the Vice Chancellor in the administration building.* Management panicked, locked the doors and finally agreed to meet a week later. At that meeting, workers spoke out, confronted UC officials, and won an agreement to delay any change in pay periods for now.

Custodians are making a list of other problems and will be planning other actions soon.

4. *Workers at Lawrence Berkeley Lab (LBL) just held their first meeting to discuss the campaign.* They talked about common issues and agreed to encourage everyone to join the union. Workers are signing up new members and will meet again soon to go over the next steps in their action plan. They are also talking to bus drivers, light truck drivers, and laborers to help arrange campaign meetings with these workers.

UC Santa Cruz

- 77 new members
- 120 contacts
- 12 new leaders identified, 6 attended our first MAT training in Oakland
- Campaigns:

1. *Contract negotiations for the Skilled Craft Unit will begin soon, and workers are gearing up to organize a campaign plan to win a better contract.*

They are asking every worker to join the union, and have held several meetings to talk about goals and strategy for their contract fight.

They've elected a negotiating team and will be working closely with organizers to keep everyone informed and involved.

2. *Custodians at Santa Cruz have been turning out in force for the first union meetings in several years.* They have elected new officers and a bargaining team to represent them in statewide contract talks.

A petition is also being circulated by the custodians.

They are planning to present it as a group

APPENDIX D

EXAMPLE OF CAMPAIGN PLANNING AND WORKPLACE ACTION MATERIALS FROM THE UNIVERSITY OF CALIFORNIA

Research:

Besides doing research for mini campaigns and to support meetings with public officials, there are three constituency groups that are targeted:

- Alumni — compiling mailing lists; on March 14th UC had an alumni Lobby Day in Sacramento and we attended with two rank-and-file workers — we distributed our talking points which were exactly the same format and color as theirs; later in the day the UCLA Chancellor was raked over the coals by a group of legislators and some rank-and-file members.
- Professors — We are doing a mailing to the Organizing Institute's list of sympathetic professors in the UC system.
- Doctors — We have been compiling lists of doctors and recently did a mailing to UCLA doctors about the contracting out of the laundry and patient care issues.

We got an incredibly high response of over 15 percent.

We are also building alliances with student groups.

Goals of the UC Contract Campaign

To improve the lives of our members and their families, protect quality patient care, and defend the quality of higher education at the University of California, by winning a strong union contract and building a strong union through:

- Building a leadership/activist network in every department, location and shift where AFSCME bargaining unit employees work by the time we begin contract negotiations in 2001.
- Engaging workers and our allies in worksite actions that build AFSCME throughout the UC system.
- Achieving over 60 percent AFSCME membership by the time contract negotiations begin in 2001.

State-Wide Calendar

LEADERSHIP DEVELOPMENT

Have at least one MAT representative in every department, location and shift where AFSCME bargaining unit employees work by the time we begin contract negotiations in 2001.

AFSCME MEMBERSHIP

- Majority status by January 1, 2001.
- Over 60 percent membership by the time we begin contract negotiations in 2001.

CHARTING THE WORKPLACE

- Prioritize the largest departments and worksites.

OVERVIEW CHARTING

- Initial overview charting done by March 31, 2000.
- 50 percent of overview charting completed by July 31, 2000.
- 100 percent of overview charting completed by December 31, 2000.

WORKPLACE CHARTING

- 50 percent workplace charting completed by July 31, 2000.
- 100 percent of workplace charting completed by December 31, 2000.

CAMPUS-BASED CALENDARS THROUGH JULY 31, 2000

- Due by March 31, 2000

ELEMENTS OF A CAMPUS-BASED CALENDAR SHOULD INCLUDE:

- a schedule for reaching 50 percent of AFSCME bargaining unit employees (blitz, other plans for reaching all departments/work locations/shifts) by July 31st
- moving the service wage re-opener bargaining survey
- identifying and developing leaders (assessing employees, scheduling MAT trainings, etc.)
- moving worksite campaigns to take on UC and build the union (fights around subcontracting, unfair treatment, workload issues, unsafe working conditions, etc.)
- setting targets for membership recruitment, in keeping with goal of achieving majority status by January 1, 2001
- involving Local 3299 leaders in the campaign

DEPARTMENT/LOCATION/SHIFT CHART (EXAMPLE)

DEPARTMENT/LOCATION/SHIFT CHART							
RADIOLOGY OUTPATIENT CLINIC (HILLCREST)	WORKER NAME	ASSESSMENT	MAT MEMBER?	AFSCME MEMBER?	DO WE HAVE ADDRESS?	DO WE HAVE PHONE #?	
DAY SHIFT	Lupe Ortiz	2	No	Yes	Yes	Yes	
	John Simmons	2	No	Yes	Yes	Yes	
	Frances Wilson	1	Yes	Yes	Yes	Yes	
	Marianne Jones	2	No	Yes	Yes	Yes	
	Sandy Mondragon	3	No	No	No	No	
	Phil Lessing	2	No	No	No	No	
SWING SHIFT	Cindy Lopez	1	No	Yes	Yes	Yes	
	Leon Nguyen	1	Yes	Yes	Yes	Yes	
	Harry Kepler	2	No	Yes	Yes	Yes	
	Susan Franks	4	No	No	No	No	
	Don Stone	3	No	No	No	No	
GRAVEYARD SHIFT	Grace Blocher	2	No	Yes	Yes	Yes	
	Fred Rivera	Ø	No	No	No	No	
COMMENTS:							

INTERNAL ORGANIZING MONTHLY REPORT

INTERNAL ORGANIZING MONTHLY REPORT						
COUNCIL _____ LOCAL _____		MONTH ENDING _____				
WORK AREA	# ON OC	# NON-MEMBERS	# MEMBERS	# SIGNED FOR MONTH	GOAL FOR MONTH	CAMPAIGN GOAL
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
MEMBERSHIP ACTIONS		DATE OF ACTION		EVALUATION		
_____	_____	_____				
_____	_____	_____				
_____	_____	_____				
_____	_____	_____				
_____	_____	_____				
COMMENTS:						

NOTES



Other AFSCME Organizing Publications of Interest:

Building Power in the Workplace (Power Point Presentation and Teaching Guide),

- a computer slide presentation summarizing the AFSCME Internal Organizing Model.

AFSCME Organizing Model and Manual,

- a comprehensive guide to external organizing, from first contact to first contract.

Communicating to Organize! AFSCME's Campaign Message Guide,

- a systematic primer for campaign message development and delivery.

Communicating to Organize! AFSCME's Organizing Communications Sample Book,

- an electronic resource of sample organizing literature.
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International Secretary-Treasurer

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