

The comprehensive organizing campaign

Materials shared with us by AFT-WA president Sandra Schroeder

While individual organizing campaigns may serve different purposes—such as winning union recognition and representation rights, increasing union density by enlisting new members, electing pro-union candidates to political office, establishing fair and effective accountability and performance standards, or achieving a decent contract—all organizing campaigns:

- Start with a powerful idea that resonates with members and the individuals and communities we are trying to reach;
- Follow a written plan that clearly states the immediate objective, its rationale and relationship to achieving a larger long-term goal, how it will be accomplished and the leverage that will be used, a timeline with milestones and benchmarks, what members will be asked to do, and a work plan that specifies who will do what and when;
- Are conducted through a cohesive work-site structure characterized by a ratio approaching one trained work-site activist for every 10 unit members;
- Involve members by asking them in person and making participation easy;
- Record, update and employ data for documenting member participation, measuring progress and determining next steps;
- Draw from a common set of skills that includes list building, research, the organizing conversation, assessments, charting, mapping, leadership identification and development and committee building; and
- Employ strategies of escalating tactics for applying steadily increasing internal and external leverage to counteract oppositional intransigence.

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A winning strategy requires taking a comprehensive look at every internal and external source of leverage with the potential to affect the outcome of the campaign. Every potential campaign should be viewed through a set of strategic considerations, such as member and community demographics, employer finances and governance, legal and regulatory environment, community and political power analysis, potential allies and opponents, affiliate readiness, and the role and likely impact of the media. It is an approach that requires research, education and agitation for organizing and mobilizing our members, potential members and allies.

Articulating powerful ideas or demonstrating proficiency in the basic organizing skills alone no longer guarantee successful outcomes. Employers, “right-to-work” front groups and political adversaries run comprehensive campaigns that employ sophisticated research, targeted messaging, community outreach, judicial and political intervention, community pressure and the media to defeat worker power. We should not be any less equipped to carry the fight to them.



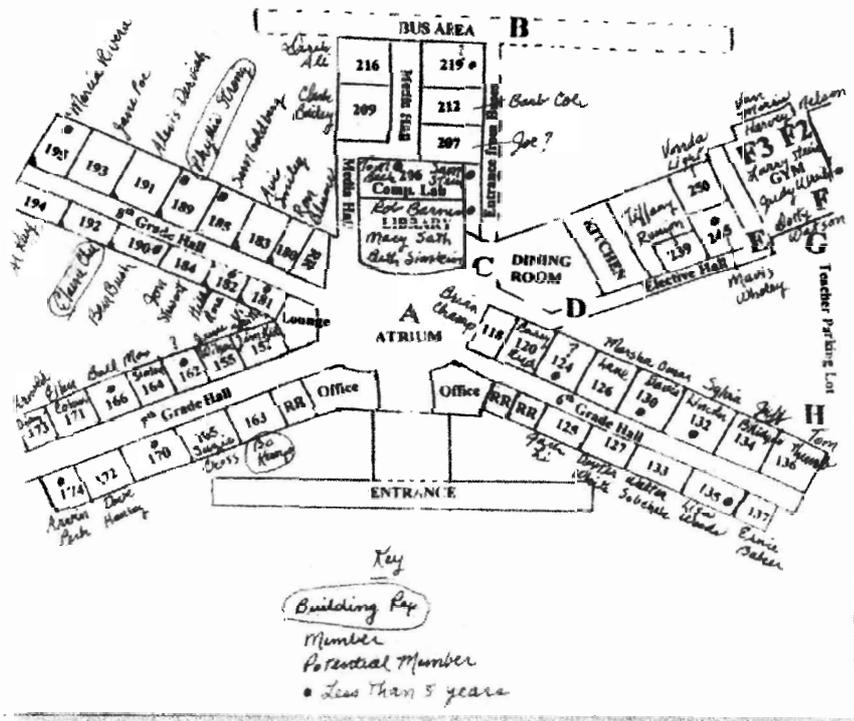
Mapping

Mapping the work site—and keeping it updated—is a basic test of the organizing committee’s commitment and effectiveness.

Mapping provides a visual depiction of the work site (or, in the case of political campaigns, neighborhoods and communities) and the locations and spatial relationship between and among unit members or voters. Unit maps show the physical locations of all unit members, supervisors and other employees outside the unit. They depict the proximities between and among individuals and groups of workers. Properly mapped turf can identify clusters of members and activists, new employees and veterans, hot spots and dead zones, where conversations have occurred and where they have not. Filled-in maps should be checked against lists and periodically updated. Mapping the work site—and keeping it updated—is a basic test of the organizing committee’s commitment and effectiveness.

Mapping on a macro or neighborhood basis will be useful in planning house calls and for identifying geographic patterns or opportunities. There are a number of commercial software programs (such as Microsoft MapPoint) that can be adapted for plotting organizing data for a neighborhood, city or a broad geographic area.

Capitol Middle School



The organizing conversation



Effective organizing means building relationships, one at a time, over time, through structured one-on-one conversations. Organizing conversations are the most effective way to gather information about unit members and the workplace, identify worker concerns and issues, impart factual information about the union, “inoculate” against the employer’s campaign, move unit members to action and assess commitment to the union.

The basic elements of the organizing conversation are:

- **Introduction**—who you are and why this conversation is important.
- **Getting the story**—what does the unit member do at work, what is it like to work there, what is satisfying about the job, what is unsatisfactory?
- **Agitate and educate**—who decides? Why are things the way they are, who has the power to determine working conditions and policies, what role do unit members have in determining work and professional conditions?
- **The union vision**—imagine how things could be different if you and your co-workers had a voice; what would your job and workplace look like, and how would things be better for unit members, the community and the people you serve if you had a voice in the decision-making?
- **Inoculation**—articulate potential objections or the opposition’s most powerful arguments, provide an evidence-based refutation, and refocus the conversation to the union solution and the power of collective action.
- **The ask**—move the unit member to action: Will you take a stand by joining with your co-workers to help build the union, will you help create a list, map your unit and fill in the names and locations of co-workers, accompany an organizer to call on another unit member, come to a union meeting, bring two people with you, sign a mission statement or an authorization card, wear a button, enlist co-workers?

Conclude by keeping the door open for further contact—that’s how 3s become 2s and 1s.

The objective is to have at least one organizing conversation with, and assessment for, every member of the unit as early as possible in the campaign. The successful organizing conversation helps provide the organizer with strategic information about the unit, identifies potential issues, helps assess individual commitment and moves the unit member to take some specific observable action in support of the union. The conversation lasts more than a few moments and should take approximately 30 minutes or longer. Organizers should be careful not to preach, exhort or “sell” the union. Instead, the organizer should aim to follow the 70/30 principle: spend 70 percent of the time listening and no more than 30 percent of the time speaking.

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Identifying work-site leaders

A good way to identify workplace leaders is by listening to the workers themselves. Whose judgment at work do they value, whom do colleagues look to in a pinch, who would they suggest needs to be involved in motivating co-workers to support the union?

Leaders are individuals that people follow. By force of personality, persuasion, example, knowledge, expertise, general competency or experience, they are able to influence the behavior of colleagues. The identification and development of leaders—and the individuals over whom they exert influence—is a crucial building block of any organizing campaign. Building and motivating a loyal majority of unit members to advance and build the union depends on identifying the key workplace leaders and then enlisting their enthusiastic support.

A good way to identify workplace leaders is by listening to the workers themselves. Leaders are identified through one-on-one organizing conversations. Unit members are asked, among other things, whose judgment at work they value, whom do colleagues look to in a pinch, who would they suggest needs to be involved in motivating co-workers to support the union?

Another way to identify work-site leaders is through direct observation. Who takes and follows through on organizing assignments (compiles unit member lists and contact information, brings colleagues to meetings and encourages them to do more, collects signatures on petitions or cards, builds crowds, etc.), sets a courageous example in the workplace, inspires others to move outside their comfort zone in taking action, reassures less confident supporters, balances good judgment with tough advocacy? Work-site leaders are those who not only demonstrate their own support for the union, but succeed in moving others to do so as well.

Identifying and developing leaders is an ongoing process that occurs throughout an organizing campaign. Through mapping and charting of the unit, potential leaders should be identified in every geographic, social and occupational group to ensure successful communication throughout the campaign.

While leaders are the organizing committee's backbone and core, not every organizing committee member is necessarily a leader, nor is every pro-union leader necessarily on the organizing committee. Sometimes the most effective thing a pro-union leader can do is to make a telephone call or engage the occasional wavering unit member in a one-on-one conversation when asked to do so by an organizer or committee member.

Finally, it is important to note that not all leaders will support the union campaign, nor is every leader necessarily a member of the unit being organized (some may be managers, support staff or other professionals). That's why it's important, through one-on-one conversations and observation, to get as complete a picture as possible of each unit member. In many cases individual unit members are influenced by several different leaders, coinciding with social groupings, primary work groups or demographic factors. In cases where a unit member's primary work group leader opposes the union, for example, the organizing committee may be able to identify leaders from other contexts (social, carpool, ethnic, neighborhood) who can bring more positive influence to bear. Moreover, the organizing committee also can identify which negative leaders might be brought around, neutralized or simply left alone.



Thinking through the organizing plan

What's the objective?

- If it's to win recognition under a statutory basis for collective bargaining, what makes this campaign viable in terms of initial member support, scale, knowledge of the employer and unit, potential leverage and strategic importance?
- If the long-term goal is to win recognition rights in a noncollective bargaining jurisdiction, what is the objective, measurable goal of this particular intermediate campaign?

What are the relevant affiliate readiness factors that must be addressed?

- What is the union's coverage in comparison to the size and geography of the district? What is the geography of the membership and leadership?
- Is an adequate structure in place for communication, assessments and mobilization? How many holes need to be plugged, and where?
- What is the union's readiness in relevant program areas (communications, professional development, publications, work-site meetings, community outreach, etc.)? Which areas require priority attention?

Strategic statement

In a sentence, what's the plan for achieving the campaign objective? Examples:

- To increase the local's readiness through targeted recruitment and strengthening its activist structure by enlisting and training at least one functioning activist representative in every work site.
- To increase state employee membership in a targeted department, job classification or location by recruiting, training and activating one work-site leader for every 10 nonmembers.
- To establish and activate a political program by enlisting enough COPE contributors and a sufficient number of active volunteers to elect a collective bargaining-friendly school board in the next election.
- To mobilize community support sufficient to defeat the proposed privatization of school transportation services by obtaining commitments from labor, religious, parent, neighborhood and other community organizations.

Campaign chronology, milestones and benchmarks

- What is the sequence of events, deadlines, accomplishments and decision points required to move the campaign from one step to the next?
- What are the building blocks and events (milestones) that mark the completion of one phase of the campaign and lead to the next?
- What are the measures of accomplishment (benchmarks) that demonstrate a milestone has been reached?
- Be specific and quantitative. Examples: Recruit x number of new building reps at x location; accomplish and document by x date how many organizing conversations among targeted nonmembers; devise and complete x number of issues-based activities tests (petitions, rallies, professional development workshops) to reach x number of nonmembers by a certain date.
- In developing milestones and benchmarks, "some" is not a number, "soon" is not a date.

General oversight considerations

- Are the strategic objectives pointed toward measurable outcomes and rooted in the reality of affiliate readiness and conditions on the ground?
- Is the campaign pointed toward objectives over which the campaign team can exercise control (i.e., "We will accomplish documented organizing conversations with at least 80 percent of unit members within the first two months" as opposed to "We will increase membership by 20 percent")?
- The completed, written organizing plan should be the result of conversations involving the campaign director, relevant affiliate leadership and the AFT regional director or deputy director. Development of the final plan should be an interactive process that includes posing questions about details, testing strategic hypotheses, mentoring and sharing advice.