

AFL-CIO

**INTERNAL
ORGANIZING
TOOLKIT**

**A Resource for Building
Stronger Local Unions**

MARCH 2017

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ABOUT THIS TOOLKIT

The AFL-CIO Internal Organizing Toolkit is a resource for local unions to address challenges facing the labor movement today. Whether it's the attacks on public-sector rights or ongoing "right to work" issues, having an active, full-membership base is our best defense and offense to achieving justice for our members and our communities. The materials contained in the toolkit are meant to help you get started on internal organizing.

There are no silver bullets, no short cuts. As you will see in the following pages, the ultimate objective is successful internal organizing and member empowerment. Building a strong union through internal organizing is the best way to do that.

This toolkit is not intended to be the only resource for internal organizing. You should contact your international/national union for help and advice.

There are issues that will be specific to your state, your sector of the economy and your workplace that you will need to take into consideration that will not be addressed here. Additionally, there may be specific matters of state law and/or your contract that you will need to address—membership authorization card language, workplace access, etc. Ultimately, you will be the best judge of what approach is right for your workplace and your members. What we have attempted to do here is provide materials that are as universal as possible and that have been tested in real organizing campaigns.

This toolkit is written with a presumption that your union's Internal Organizing Committee will have access to bargaining unit members in the workplace. In some instances this may not be the case. However, the materials of this toolkit apply to internal organizing drives that are done through house visits as well.

BACKGROUND INFORMATION

Attacks on Fair Share

What is fair share?

“Fair share” means all workers who are protected by the terms of a collective bargaining agreement share in the cost of negotiating and administering those protections. Union members pay union dues and nonmembers pay fair share fees. (No worker may be required to join a union). Fair share arrangements are legal in the private sector in 22 states and in the public sector in about half of the states.

What is “right to work”?

In right to work states, workers who are protected by the terms of a collective bargaining agreement can decide not to join the union and cannot be charged a fair share fee. In other words, they get the benefits of a collective bargaining agreement and union representation without paying their fair share of the costs.

With the recent passage of right to work legislation in Kentucky and Missouri, 28 states now are anti-fair-share states for workers in the private sector.

What about the public sector?

In about half the states, state law permits unions and public-sector employers to negotiate fair share arrangements by which all workers share in the costs.

What’s the status of the legal attacks on fair share in the public sector?

Fair share was upheld by the U.S. Supreme Court more than 40 years ago in *Abood v. Detroit Board of Education*. Anti-union groups have been fighting fair share ever since. Last year, the Supreme Court affirmed fair share by a 4–4 vote in *Friedrichs v. California Teachers Association*, after Justice Antonin Scalia’s

death. Several cases challenging fair share are in the lower federal courts, making their way to the Supreme Court. It is very likely the Supreme Court will hear another challenge to fair share in its 2017–2018 term, which begins in October 2017. If the court takes a case on the legality of fair share, a decision will be issued by no later than June 2018.

What happens if the Supreme Court outlaws fair share?

If the Supreme Court decides that fair share in the public sector is unconstitutional, unions and employers will be required to immediately stop collecting fair share fees from nonmembers.

Would an adverse decision affect a union’s ability to collect dues from members?

No. It is important to understand that these challenges are about nonmembers. The court’s decision would not have any direct impact on a union’s relationship to its members. Of course, if the Supreme Court rules that it’s unconstitutional for nonmembers to be required to pay an agency fee, this may lead some union members to resign their memberships and cease paying dues, because they no longer will have any obligation to pay their fair share of the cost of representation.

What about payroll deductions? Will the Supreme Court’s decision change that?

No. Payroll deduction will continue to be governed by state law in the public sector and the collective bargaining agreement. But as part of their ongoing effort to weaken unions, anti-union groups are aggressively pushing state legislation to restrict public-sector unions’ ability to collect dues and fees through payroll deduction.

TAKING STOCK OF YOUR SITUATION

The best preparation for attacks on fair share or right to work legislation is an effective internal organizing program. If more fee payers are signed up and more existing members have renewed their commitments to the union, the impact of a bad court decision or right to work legislation will be lessened.

A number of national unions did research and polling of their members and fee payers to help the unions make plans. One of their most important findings was that the reason most cited by fee payers for not being a member was that they “were never asked.” People don’t get asked because they slip through the cracks. They don’t attend the new-employee orientations. There isn’t a steward in their area. The steward thinks that it’s someone else’s job to sign them up. Whatever the reason, it’s our job to make sure that we all see signing up members as our mutual responsibility. It may sound overly simple, but just making sure that everyone is asked to participate fully is the most fundamental thing that we have to do. Most fair share fee payers have reached that status by default, not by choice. Potentially, the most important action we can take to undermine the Koch brothers’ efforts is simply to ask everyone that we represent to become a member.

1. Get Your Membership Information Together

Before you develop a plan to sign up the potential members and recommit our current members, you have to make sure that your lists and databases are as up to date as possible. You will need to figure out what we need to know, how to get the information and how to keep it.

What is the current practice of the employer providing information to the union regarding the members of the bargaining unit?

Many times, your collective bargaining agreement defines the information the employer provides to

the union and how frequently. Generally, with public employers, information beyond what the contract spells out may be accessible as public record.

Ideally, you want to know all of this information:

- Name
- Date of Birth
- Hire Date
- Job Title
- Department
- Worksite
- Shift/Hours
- Days
- Home Mailing Address
- Home Phone
- Cell Phone
- Email Address (work and nonwork)
- Membership Status
- Date of Membership
- Language Spoken
- Other Information: membership meeting attendance, COPE contributions, etc.

In addition to formal information gathering, *getting information informally is one of the best tasks to give a new potential activist.* Going over a list with them and figuring out what they know or what they can find out is a great first task to get someone started and a good way for you to judge if they are committed to helping.

2. Keeping Track of the Data

Depending on the size and resources of your local union, you may want to consider how this information will be stored, used and shared. Some questions to ask yourself:

- Does your national union have a database template that it encourages locals to use?
- Does your local union have a functioning database?
- Is the group small enough that a simple Excel sheet might suffice, or do you need a more elaborate database?

- Who will do the data entry, and who gets to access the data?
- Will stewards/activists get lists of their departments/work areas, and what information will be included on that list? Is there any information that is sensitive that you don't want to share?
- How will information—contact sheets, authorization cards, etc.—get fed back into the data entry system?
- Do you have copies or originals of your members' authorization cards?

3. Charting

Organizing charts are often useful tools for preparing an organizing plan. For the purposes of internal organizing, we recommend charting bargaining unit members by worksite and shift. Making a chart helps you identify, in a visual way, where your holes are; where you need to recruit stewards/activists; and who can be identified as the natural leaders for a particular shift or at a particular worksite. Please find sample blank charts and models in the Appendix.

4. New-Employee Orientations and Other Meetings

New-employee orientations and other meetings of employees can be highly efficient opportunities to sign up members. Your contract will likely have language about your access to new-employee orientations. If you aren't already participating, ask to have a time set aside to make a presentation—ideally without management in the room. Be sure to have stewards available to follow up with new employees one-on-one to make sure that they sign up. If management won't give you access to new-employee orientations and other staff meetings, consider making this a priority in your next round of bargaining.

5. Leaders: Stewards and Activists

In a new workplace-organizing campaign, we often say that the success or failure of the campaign will be determined by the organizing committee. There is very little that an employer can do to stop an organizing campaign if the committee is:

- **Big enough**—roughly one activist per 10 workers.
- **Representative** of the diversity of the workforce (by shift, classification, gender, ethnicity, etc.).

- Composed of the **natural leaders** in the workforce.
- **Committed** to doing the organizing work (actually having one-on-one conversations with all their co-workers).

The same is true for internal organizing. As a leader, you have to ask yourself if that is true of your current steward structure.

- Do you have enough stewards/activists, and are they the right people?
- Are they in the right places?
- Are they committed to internal organizing?

Chances are that the answer to at least one of these questions will be no. That's OK. You are not alone. Sometimes the current stewards will be great at internal organizing but in other instances, less so. You want to make sure that you always have room for people to get involved. You may want to consider a round of activist recruitment and development before launching a major internal organizing campaign.

Principles of Activist Development

Do everything possible to make someone's first volunteer experience a success. If you are talking to people at work or in house calls, make sure to pair new activists with more experienced people until they feel comfortable on their own. Give your activists specific assignments—lists to track down, individuals to talk to, etc.

As you grow your steward/activist base, keep in touch with them on a regular basis. This is an excellent role for the local union staff and elected leaders to play.

Consider getting stewards and activists together for a meeting to strategize, or do something social to make being involved feel fun. Your goal is to build a group identity and especially help new activists feel welcome—like they are a part of something. Once you have enough of your co-workers committed, you may want to try to schedule a more formal organizing training.

STEPS TO IDENTIFY AND RECRUIT ACTIVISTS

Call/visit every member who has ever been to a membership meeting or some other local union function.

- Talk with them about their concerns about work and what they would like to see changed. A small percentage of these contacts will yield results, but remember that you don't need a massive number of activists.
- You are looking for people who are interested in volunteering to make their workplaces better by getting more people involved in the union.
- You also don't need to have a long conversation with everyone. In most instances, you'll be able to get a feel for people who could be successful at organizing.
- The important thing is that you are reaching out to members who have shown some interest in the union, who you don't talk to on a regular basis.
- Make your first ask of them an easy one, like introducing you to a few co-workers or going over a list of who is in their department to see if the local's information is up to date. If they complete one thing, ask them to do something else slightly more significant within a week or so.
- Remember, "The hand leads the heart." The more they do, the more they will care.

Call/visit every new member or employee.

- Similar to calling/visiting everyone who has come to a membership meeting (see above), calling every new member is a tactic that you can use to get to know your members and make participation in the union a normal part of the culture of your workplaces.
- When people are new in a job, they are looking for ways to fit in and figure out how to make the most of new opportunities. Some unions have developed active and successful young workers programs to tap into youthful energy and make sure that young people know that there is a place for them in their unions.

Call/visit with the natural leaders.

- This is similar to the previous two tactics, but here, the pitch has to appeal to the leader's sense of the role that they play with the people who they influence.
- If you have charted your workplaces, you may find the areas where you need leaders.
- Make sure to take into consideration language and other group affinities when considering natural leaders. Are there people with certain language abilities that you need to reach some workers?
- Also, be mindful that you want to respect natural leaders but not let them be gatekeepers to large groups of workers. In the instance where a leader claims to speak (negatively) for a whole group, make it clear that each individual gets to make their own decision.

Use Facebook to find members who have progressive politics and personal connections.

- You can search Facebook by employer.
- In the Facebook search box, enter "People who work at [Your Employer's Name]."
- You can also add other variables to your search that might make someone more likely to be a potential union activist. For example, you could try "People who work at [Your Employer's Name] and like Barack Obama." Facebook has a few different ways that it shows search results. You'll want to make sure that you're clicking the label for "People" search results.
- Also, just searching Facebook for co-workers can show who has mutual friends and other connections.
- Be careful how you use this information. While people share a lot on Facebook, they may not want it used. Do unto others as you would have them do unto you.

Ask everyone, all the time.

- It's a good practice to ask all members to volunteer in some capacity.
- They may say no, but at a minimum, they will know that you are serious about wanting their help. More importantly, some percentage will also say yes.

MAKING A PLAN

For any internal organizing plan to be effective, a written plan must be developed. An effective plan establishes goals and provides the details of the work necessary. It provides a timeline and accountability measurements that can let you know if you are on track or need to retool. The best plans in the world become nothing more than dust collectors unless you have the people prepared to play their parts and make sure the plan is carried out. The plan allows all of those committed to and responsible for the goal to understand their roles and responsibilities.

Setting Goals

Internal organizing in preparation for attacks on fair share or a potential right to work scenario may have multiple goals. Here's a sampling of a few:

- Increase the number of members who will maintain membership in a right to work setting.
- Organize fair share fee payers into members.

- Increase the number of worksite union leaders/activists.
- Renew membership cards and dues check-off authorization for current members.
- Increase the number of members making voluntary contributions to the union's COPE (political) program.

Numeric goals should be the benchmark when writing your internal organizing plan.

Borrowing from the work of one of our affiliate unions, we have created a sample and template (below), which you may find valuable in establishing your union's internal numeric organizing goals.

The exercise can be done for a local union, a worksite or a department. You could easily set up an Excel worksheet to do projections by department if that is how your workplace is organized.

SAMPLE INTERNAL ORGANIZING GOALS WORKSHEET

LOCAL/DEPARTMENT/WORKPLACE: Local 123 / Anytown Public Employees

GOALS: 85% of represented workers signed up as members (Goal 1)
 80% of existing members recommitted to the union (Goal 2)
 10% of members active in internal organizing campaign (Goal 3)

CURRENT STATUS

A	B	C	D	G	E
Total # of Workers in Bargaining Unit	Current # of Members	% Memberships (B÷A)	Total # of Stewards/ Activists	% of Membership Activists (D÷A)	Members Recommended
150	110	73%	7	5%	0

GOAL WORKSHEET

MEMBERSHIP GOAL	RECOMMITMENT GOAL	STEWARDS/ACTIVISTS GOAL
Step 1 Total Workers x Goal % of Represented Worker Members = Total Membership # Goal Step 2 Total Membership # Goal - Current # of Members = New Members	Current # Membership x Goal of Recommits % = # of Recommits	Step 1 Total Membership x Activist Goal % = Total # Activists Step 2 Total # Activists - Current Activists = # New Activists
Step 1 150 x 0.85 = 128 members Step 2 128 - 110 = 18 new members	110 x 0.80 = 88 recommits	Step 1 128 x 0.10 = 13 Step 2 13 - 7 = 6 new activists

SAMPLE INTERNAL ORGANIZING GOALS WORKSHEET

LOCAL/DEPARTMENT/WORKPLACE: _____

GOALS: _____ of represented workers signed up as members (Goal 1)
 _____ of existing members recommitted to the union (Goal 2)
 _____ of members active in internal organizing campaign (Goal 3)

CURRENT STATUS

A	B	C	D	G	E
Total # of Workers in Bargaining Unit	Current # of Members	% Memberships (B÷A)	Total # of Stewards/Activists	% of Membership Activists (D÷A)	Members Recommited

GOAL WORKSHEET

MEMBERSHIP GOAL	RECOMMITMENT GOAL	STEWARDS/ACTIVISTS GOAL
<p>Step 1 Total Workers x Goal % of Represented Worker Members = Total Membership # Goal</p> <p>Step 1 Total Membership # Goal - Current # of Members = New Members</p>	<p>Current # Membership x Goal of Recommits % = # of Recommits</p>	<p>Step 1 Total Membership x Activist Goal % = Total # Activists</p> <p>Step 2 Total # Activists - Current Activists = # New Activists</p>
<p>Step 1 ____ x 0. ____ = ____ total members</p> <p>Step 2 ____ - ____ = ____ new members</p>	<p>____ members x 0. ____ = ____ recommits</p>	<p>Step 1 ____ members x 0. ____ = ____ activists</p> <p>Step 2 ____ total activists - ____ current activists = ____ new activists</p>

Planning: Step by Step

Goals are only the start of a planning process. Figuring out how to achieve your goals will require getting precise about the many intermediate steps and answering questions so you can best implement your program. For example:

- How many activists do you have now, and will you need more? From what areas?
- How many new members can be signed up per week, and how many weeks will it take to reach your goals?
- What role(s) will your staff play?
- Are there particular calendar issues to be aware of, such as when new employees are hired? Are there new-employee orientations?

While there is no cookie-cutter plan that we can offer here given the diversity of the local unions and workplaces of AFL-CIO affiliates, we have developed an outline template that may be helpful. We have filled in some of the details that we think would be fairly universal, but we expect that you will have many more.

In addition to the initial steps, which likely won't be repeated, we encourage you to see internal organizing as a process that will need to be continuously refined.

Debrief with Stewards and Activists

Weekly (or sometimes daily) debriefs with your stewards and activists to help talk through difficult conversations or address new issues that have arisen are essential.

Internal Organizing Committee Meetings

You may want to consider holding a quick (less than 45 minutes) weekly activist meeting so all of the people working on the campaign can share their experiences and you can react quickly and consistently to what is coming up on the ground. In a typical new, external organizing campaign, this would be an organizing committee meeting. The same kind of structure may be called for here given the seriousness of this issue.

In addition to this rough outline plan, you can also find in the Appendix a template plan for larger AFSCME locals, which may be worth emulating.

INTERNAL ORGANIZING PLANNING TEMPLATE

1. Build Support Among Leaders for Internal Organizing Program

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • Briefing for local leaders on challenges facing the local union (RTW, etc.) • Review member vs. fair share fee payer numbers by bargaining unit/ department/etc. • Discuss issues that could be focus of internal organizing campaign 	<ul style="list-style-type: none"> • Local union president 	<ul style="list-style-type: none"> • DATE

2. Identify and Solve Problems with Member Information

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • Review process for updating bargaining unit information from employer • Review database procedures • Identify gaps in member information • Analyze what departments have shortfalls 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •

3. Prep Materials

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • Check in with national union about authorization card language • Design and production 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •

4. Recruit Activists and Leaders

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • Briefing for current stewards • Call members who have attended union meetings in the last year 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •

5. Training

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • Planning for training • Recruiting activists to attend • Do training 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •

6. Launch—Week 1

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • 10 new members • 30 recommits • 2 new activists • Weekly debriefs • Data entry • Standardized report to local union e-board 	•	•

7. Week 2

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • 10 new members • 20 recommits • 2 new activists • Weekly debriefs • Data entry • Standardized report to local union e-board 	•	•

8. Week 3

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • 10 new members • 25 recommits • 2 new activists • Weekly debriefs • Data entry • Reports to local union e-board • Action directed at issue target 	•	•

9. Week 4

What needs to be done	Who is responsible	When completed
<ul style="list-style-type: none"> • 15 new members • 30 recommits • 2 new activists • Weekly debriefs • Data entry • Reports to local union e-board • Communication to membership about internal organizing campaign progress 	•	•

Add more weeks as needed.

ISSUES

As various affiliates have been working on internal organizing campaigns, one thing has become clear: You will be more successful if your call for new and renewed membership is linked to workplace issues rather than just a membership appeal.

You should frame your internal organizing campaign in the context of important fights for your local union. If contract negotiations are approaching, that should be the focus. The one-on-one conversation should include the activist saying something like, *“Everybody is signing up so we can be strong as we get to the bargaining table. Can we add you to that growing list?”*

If your employer is considering privatizing a portion of the workforce, your stewards should say, *“We are all sending our employer a clear message that privatization isn’t going to work, and we need to be strong to do that. Can we count on your support by signing a membership authorization card?”*

Or if your collective bargaining rights are under attack, *“Pro-CEO legislators are considering laws that would take away our right to have a say on the job as a union; we all need to stand together to show them that they can’t balance the budget on our backs. Will you stand together by signing a membership authorization card?”*

Not Just Membership for Membership’s Sake

Don’t have people say, *“Join the union; it’s just the right thing to do.”* That won’t be so compelling. Most people already know it’s the right thing to do. You have to appeal to their **self-interest** and the feeling that **everyone is doing it**.

Identifying Issues—Think Big

Identifying the issue that will be the focus of your campaign is an important task. As you and the leaders and activists of your union flesh out compelling issues, it is important that you test to make sure issues that are compelling to leaders also resonate with rank-and-file workers. Chances are you already do some version of a contract campaign as you prepare for bargaining, so it may be useful to think in new ways to approach big issues. A group of unions came together in the wake of the attacks on public-sector bargaining to talk about how to make broad public demands in bargaining. They put together resources that are available here: bargainingforthecommongood.org. We aren’t suggesting that this approach is right in every situation, but it may be worth considering and may be a motivating factor for your co-workers who aren’t already involved in the union.

Listening and Adapting

It’s worth repeating that listening skills for internal organizers are critical. The organizer should have the background on all issues that are likely to come up and should understand how to pivot from whatever issue workers raise to the way that that issue is better solved when we join together. Also, the debriefing process is an important way for new issues to be raised and taken into account in the union’s overall strategy.

ADDRESSING ISSUES IN THE WORKPLACE THROUGH CONCERTED ACTION

Most members are cut out of the process when we only address workplace issues through a grievance procedure or other labor management settings. The ability to agitate issues in the workplace and orchestrate a broad workplace-based concerted action makes your union a living, breathing organization that has power.

For example, let's say there's a worker, Susan, who has been unreasonably denied leave to attend to a sick child. What would happen if 90% of the bargaining unit simultaneously applied for family leave, and the same 90% of workers wore a union button that said "I Am Susan"? This is powerful, and when you win, everyone who participated will feel like they had a part in the victory, unlike when grievances are won without workplace activity.

We are not suggesting that grievance and labor management solutions be abandoned, but instead, when a strategic opportunity presents itself, operate on a dual track. Most unions have a sophisticated grievance and contract enforcement system in place. We need to add an organizing perspective to the issues the grievance system identifies.

CHECKLIST: CONSIDERATIONS FOR ORGANIZING ISSUES AND GOALS

Not every consideration must be met by each goal, but it's good to use these criteria to check to see if our goals are useful.

- Addressing the issue will result in real improvement (not just window dressing).
- The issue is widely felt.
- The issue is deeply felt.
- The issue is winnable.
- Addressing the issue will build the union.
- The solution to address the issue is SMART (specific, measurable, achievable, realistic and time-bound).
- The issue reflects real needs of our members.
- Members are willing to fight for this issue.
- The solution to the issue reflects our values, the needs of those we serve and our community.

THE ONE-ON-ONE

The most effective way to organize is through one-on-one communication. Emails, department meetings, text messages, robocalls—none are as effective in getting people to take action as face-to-face conversation. Those face-to-face conversations are especially effective when they are with someone that the person already knows or with whom they identify.

Whether your goal is to get your co-workers signed up for the first time or recommitted to the union, talking to them individually will be the most effective way to achieve that goal. Engaging one-on-one is the core of all organizing and is the basis for how movements grow. It may feel slow and tedious, but there are no shortcuts.

Whether it's organizing a new worksite or signing up members, the conversation and the task are similar. You are trying to get someone to take an action that they aren't already doing that is in their best interest.

Where to Talk?

You'll probably want your activists to talk to people at work. In most instances, you're free to talk at work so long as it's on break time and in nonwork areas, but in general, if you are allowed to talk about last night's ball game in your work area, then you're allowed to talk about union matters.

THE ONE-ON-ONE CONVERSATION

We typically break organizing conversations into five parts:

- Introduction
- Listen—Get Their Story
- Agitate and Educate
- Commitment
- Inoculation

Not every conversation will be the same, but thinking about these component parts will help you and your activists keep on track.

1. Introduction

You'll want to tell the person why you're talking to them. It's good to be friendly and direct. Don't ask if it's OK to talk unless you have some reason to believe that it might not be an OK time. Many people will try to put off conversations that require them to make a decision. It's your job to convey a sense of urgency so you get to have the conversation and can move on to other people and keep making progress.

You'll want to say something like:

"Hi, I'm _____, and I work in the _____ department. I'm talking to our co-workers about the pension changes being proposed by the Board of Education. What have you heard about that?"

Obviously, you should craft an introduction that reflects a key issue in your workplace. Notice that this introduction ends with an open-ended question rather than a yes/no question. That way, your co-worker is more likely to give a response that enables more discussion.

2. Listen—Get Their Story

In this phase of the conversation, you'll want to find out more about your co-worker. Show a genuine interest in what their concerns are—what work is like for them. This may lead naturally into their identification of issues that they have, but if you need to get the conversation going, try to engage them with open-ended questions like:

- How long have you worked here?
- How have things changed in that time?
- If you could change something about working here, what would it be?

Make sure to empathize. To the extent that the co-worker brings up criticism of the union, don't get defensive.

3. Agitate and Educate

After the person you are talking to has identified some of their concerns, or you have spoken about the main issue that is the focus of the campaign, you'll want to relate the issues to what we are all doing as a union to address that concern. Linking what they care about to why having a stronger union matters is the goal of this part of the one-on-one.

You'll want to say something like:

"I'm like you. I don't know when I'm going to retire, but I do know that part of the reason I took this job was for the benefits that we get. It's important to a lot of us to keep them. That's why we are signing people up for the union. If more of us are members, it sends a clear message to management that we are unified and paying attention. That's the first step."

4. Commitment

After you have related their concerns with the need for union membership, you have to get their commitment. The commitment can be whatever you've designated for your campaign. It could be signing a membership authorization card or signing a petition. The important thing is that you are calling the question on where they stand.

You'll want to say something like:

"It's been great talking. Can we count on you to show your support by signing a membership authorization card? This will make you a full member in the union, just like most of your co-workers."

You'll want to hand them the card or whatever organizing commitment you are using. You may have to be quiet for a minute while they read it. That's OK. Sometimes you need to put them on the spot a little bit to make a decision.

After they have signed, you'll want to pitch anyone who was enthusiastic or who is a key leader on doing more. Asking many people to participate keeps the union democratic and helps stop the union from being seen as a clique. Also, we need all the help we can get. Ask for something small that can be done right way, like introducing you to some of their co-workers, or helping to refine your information about who works in their area.

5. Inoculation

Given the possibility of negative Supreme Court rulings and the likelihood of more right to work fights, we want to forewarn union members about the possibility of negative changes on the horizon and "inoculate" them from the right-wing messages to come. Your goal is to help them frame how to understand it so they are less likely to drop their membership.

You'll want to say something like:

"Have you heard about the most recent attack on our rights as employees? The same people who helped fund other attacks on the public-sector worker's right to have a union have brought a lawsuit claiming that public workers should have a constitutional right to be free riders—to get the benefits of the union without paying. Why do you think rich CEOs and their political friends would want to do that? (Wait for response.) Right, they just want to weaken unions so they can get their way—more money for them, less for everybody else. When workers in Wisconsin lost their rights, many lost \$400 a month in pay and benefits. You may see mailings or billboards encouraging people to drop their memberships. That would leave us weak—which is the goal of these CEOs."

A similar version could be adapted for the right to work context.

In general, you will want to write a "rap" for these conversations that is specific to your workplace(s) and campaign issues. While each conversation will differ, a written rap is helpful for training and consistency.

ASSESSMENTS

In order to track the progress of your campaign, you will need a way to assess each one-on-one conversation. Organizers use assessments to categorize the different results of those conversations. You will need to train your stewards and activists to rate each of the co-workers that they engage.

Assessments are necessary and helpful for the following reasons:

- Assessments allow you to get precise about the progress of the overall campaign.
- Assessments help maintain consistency about the results of one-on-ones.
- Assessments help make organizing more efficient by letting you know who has been engaged.

After each conversation, the steward/activist should rate the person that they have spoken with and keep track of that on a contact or debrief form. Whatever form you decide to use should get filled out with notes, especially in the case of workers who are undecided. Stewards/activists should be able to explain why an individual was given a particular rating by describing things that the person said or did.

A Word of Caution

It's worth noting that sometimes people feel uncomfortable about this process, and it's better kept out of the public view. Caution your stewards/activists to be careful with any documents that contain ratings. They should only be shared with people actively engaged in the internal organizing program.

See Appendix for a sample debrief and contact sheets.

FOUR-POINT EVALUATION SYSTEM

Rating	Definition	Description
1	Activist	<ul style="list-style-type: none">• Actively supports union by organizing or some other task they have been asked to do.
2	Union supporter	<ul style="list-style-type: none">• Takes action to support the union. Signs a membership card or recommitment.
3	Undecided	<ul style="list-style-type: none">• Unsure if they want to recommit/become a member.• Need some specific follow-up.
4	No/likely to drop	<ul style="list-style-type: none">• Unwilling to join or recommit to the union. Will likely drop if opportunity arises.

Internal Organizing Dos and Don'ts

DO

Listen. When we try to address issues in the workplace, we have to listen to what other people's concerns are. If you're doing most of the talking, you're not getting the information you need to work with someone effectively. You can make a passionate case, but unless you're addressing what your co-worker cares about, you won't get very far.

Ask Open-Ended Questions. The best way to organize people to take action is to find out where they are coming from and what they are willing to do. Try to ask open-ended questions. Let's say your workplace is going through budget cuts, and you want to mobilize people to fight back. Asking a co-worker, "How do you feel about the budget cuts?" would be more likely to generate a real conversation than asking, "Isn't management going about these budget cuts in the wrong way?" Here are some other examples of open-ended questions: How long have you worked here? What do you think is the most important issue for us to work on to protect our union? What changes have you seen since you started working here?

Be Systematic. Get your lists together. Figure out whom to talk to first. Make sure you keep a good record of whom you've talked to and what you need to follow up about.

Don't Tell the Boss...Yet. Working quietly, at first, is every change agent's biggest advantage. Employers who want to keep control and even cynical co-workers will try to shoot down efforts to make changes. You don't have to tell everyone at once. Remember, you're in control of your own timeline. For example, if you're doing a petition at your workplace, don't tell your supervisor until you have a majority of your co-workers signing on. Every situation is unique, but be sure to be strategic.

Ask for Help. No one is good at everything. We all need help. Ask the people who support your idea to do something to help. Even if it's a small thing, remember the hand leads the heart. The more someone does, the more committed they become.

DON'T

Don't Assume

Often the issues that you think might be most important aren't the issues that motivate other people. Keep an open mind and listen.

Don't Give Up Too Soon

We know that any effort to change things is hard. There will be setbacks and successes. Some people may brush you off, but be dogged. You are trying to do something that matters, and change only happens because people like you take the lead and help others exercise their power.

Don't Argue

While you may be a great debater, you won't be successful if you approach organizing as an effort to prove that you're right and someone else is wrong. Try to find points of agreement. When you have cleared up a misconception or presented a different viewpoint, you may need to ask if that makes the person you're talking to feel differently about the topic—i.e., give them a graceful way to change their opinion.

Don't Take It Personally

Sometimes you're going to run into someone who is rude to you. Don't take it personally, and don't let it make you afraid to talk to other people. Good organizing experiences feel great, but be sure to not let bad ones make you feel down. You also never know how people's opinions are going to change. Sometimes the person who is opposed at first can be moved.

Answers to Common Questions and Objections

Formula for Overcoming Objections

When we ask a co-worker to join the union or get more active, we sometimes hear objections from them (the “Yeah, but...”). This formula will help you overcome those objections and be successful at signing up your co-workers and getting them more active.

1. **EMPATHIZE:** “I hear what you’re saying about... (bad union experience, dues are too much, etc.)”
2. Briefly **ANSWER** the objection.
3. **REDIRECT** the conversation back to their issue and motivation: “You were telling me that (issue) is a concern and that it’s negatively impacting (motivation).”
4. **ASK AGAIN:** “How will (issue) get better if we don’t act now? So are you ready to stand with your co-workers and recommit to the union?”

Examples of Objections and How to Answer Them

Co-Worker: “My staff rep/local president doesn’t do anything for me!”

Activist:

1. I hear what you’re saying, and we all deserve the strongest representation possible. And if you’re like me, you want to make sure that the union is doing a good job.
2. However, the truth is that when people stop being members of our union, all of us get less. When we lose members, we stop being able to effectively negotiate over those wages and benefits you mentioned.
3. That’s why it’s so important that we strengthen our union. You were telling me that you’re frustrated with the seniority system in your department right now.
4. Do you think that’s going to get better on its own? No, but if we prioritize it in our next contract

negotiations, we can improve the policy. So what do you say; are you ready to stand with us and recommit to our union?

Co-Worker: “I’ll recommit to the union as soon as John finally stops being the president!”

Activist:

1. Oh, I’m sorry to hear that, but I have to tell you, I’m surprised to hear you say that would keep you from recommitting to our union and the strength we have together.
2. No matter who the president is, the strength of our union comes from the members. The fewer of us who are in our union, the weaker we will be and the less we’ll be able to accomplish.
3. You told me yourself that you’re worried about the new governor blocking our negotiated raises.
4. How will we protect our wages against the governor if our union loses members like you? So what do you say; are you ready to stand with us and recommit to our union?

Co-Worker: “I am not for [Candidate Name]; I don’t think the union should be using dues for politics.”

Activist:

1. I hear you.
2. Our union cannot and does not use dues for politicians. That’s prohibited under the law and we take that very seriously.
3. Here’s a fact that you should know: The big-money groups pushing this case to the Supreme Court right now are deliberately trying to confuse folks about that. Their real agenda is to take away our voice on the job.
4. In fact, that’s why it’s so important to strengthen our union. The stronger our numbers, the stronger our union. So what do you say; are you ready to stand with us and recommit to our union?

Organizing Chart Samples

Maintenance Shop No. 7
Organizing Chart

	WORK AREA	WORK AREA	WORK AREA	WORK AREA	WORK AREA	WORK AREA	WORK AREA
8 AM TO 4:30 PM	OFFICE	PARTS DEPT	SHOP	SHIPPING	CUSTODIAL	GROUNDS	
	Laura Hoffner	Wayne Cox	Ken Zell	Tyrone Watts	Samantha Watts	Buster Parks	
	Rita Lambert	Junior Wells	Ron Burk	Stacy Adams	Karufel Seid		
	Karl Farouk	Stacy Kent	Sam Brank				
	Bruce Jennings		Mohamed Alz				
			Frank Tate				
			Jess.c. Cronks				
4 PM TO 12:30 AM	Tyffance Hart	Warren Schiff	Eduardo Gomez	Tanice Hull			
			Sonia Perez				
Midnight TO 8:30 AM		Cicely Britz	Chu Fong				
			James Bive				

= Union Member = Fee Payer

Maintenance Shop No. 7
Organizing Chart

	WORK AREA	WORK AREA	WORK AREA	WORK AREA	WORK AREA	WORK AREA	WORK AREA
8 AM TO 4:30 PM	OFFICE	PARTS DEPT	SHOP	SHIPPING	CUSTODIAL	GROUNDS	
	Laura Hoffner	4 Wayne Cox	2 Ken Zell	Tyrone Watts	2 Samantha Watts	1 Buster Parks	
	4 Rita Lambert	1 Junior Wells	4 Ron Burk	Stacy Adams	Karufel Seid		
	1 Karl Farouk	3 Stacy Kent	2 Sam Brank				
	Bruce Jennings		Mohamed Alz				
			1 Frank Tate				
			1 Jess.c. Cronks				
4 PM TO 12:30 AM	Tyffance Hart	3 Warren Schiff	Eduardo Gomez	Tanice Hull			
			Sonia Perez				
Midnight TO 8:30 AM		Cicely Britz	Chu Fong				
			James Bive				

= Union Member = Fee Payer = Union official = Key Activist = Union supporter = weak member = Member in Name only

Sample Rap for One-on-One Conversation

Introduction

“I’m _____, and I work in (Department). I’m talking to our co-workers about our upcoming contract negotiations. Have you heard about the changes that management wants to make to our health care?”

Listen—Getting Their Story

“They want to increase what we pay for insurance, increase our copays and change some of the providers we can use. What’s been your experience with our health care? (If they don’t respond to this question, try a more general open-ended question like “How long have you worked here?”)

Agitate and Educate

After you have identified some of their concerns, “I hear you. We’ve got to make sure that we preserve our benefits. Like you, good benefits are one of the reasons I decided to work here.”

Commitment

“In order to win at the bargaining table, we need to show management that we are unified. Can we count on your support by signing this membership authorization card?” (For fee payers or nonmembers: “This will make you a full member of the union like most of your co-workers.”)

Hand them the card. It’s OK if they want time to read it. It’s OK if they are quiet for a minute.

If the person has been enthusiastic, ask them to do more. “Can you introduce me to some of your co-workers?”

Inoculation

“Thanks for taking the time to talk today. One last thing: Have you heard about the most recent attack on our rights as employees? The same people who helped fund other attacks on the public-sector worker’s right to have a union have brought a lawsuit claiming that public workers should have a constitutional right to be free riders—to get the benefits of the union without paying. Why do you think rich CEOs and their political friends would want to do that? (Wait for response.) Right, they just want to weaken unions so they can get their way—more money for them, less for everybody else. When workers in Wisconsin lost their rights, many lost \$400 a month in pay and benefits. You may see mailings or billboards encouraging people to drop their memberships. That would leave us weak—which is the goal of these CEOs.”

Debrief Form

Worker Name: _____ Steward/Activist Contact: _____

Job title: _____ Department: _____

Date: _____ Location: _____

Cell Phone: _____ Home Phone: _____

Email: _____

Issues: _____

Outcome: _____

Follow-Up Needed: _____

By Whom/By When: _____

Rating: 1 2 3 4

(For Office Use)

Date entered into database: _____ Entered by: _____

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