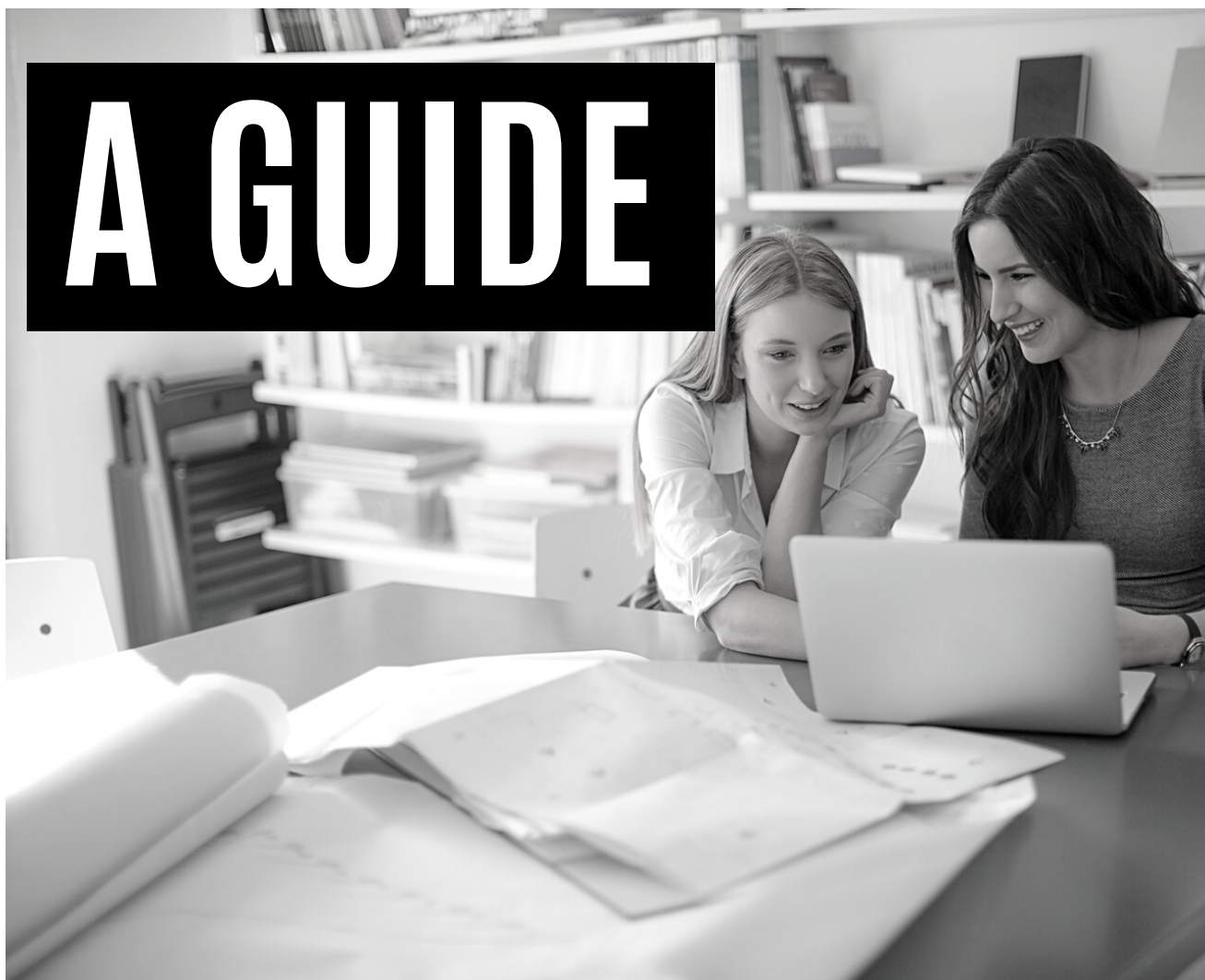




# ENGAGING PROFESSIONALS

# IN THEIR UNION

# A GUIDE



# TABLE OF CONTENTS

Introduction	2
<b>PART 1: CONTINUOUS MEMBER ENGAGEMENT</b>	3
Foundations of Member Engagement	3
Planning Effective, Ongoing Member Engagement	3
The Organizer's Toolbox: Tactics, forums, and programs to engage members	5
<b>PART 2: BUILDING AN INTERNAL ORGANIZING CAMPAIGN</b>	8
Step 1 – Preparation and Analysis	9
Step 2 – Develop Campaign Strategy	10
Step 3 – Develop Campaign Structure	11
Step 4 – Recruit a Team of Volunteers	12
Step 5 – Create a Plan to Achieve Campaign Goals	13
Step 6 – Identify Persuasive Campaign Messages	14
Step 7 – Identify Campaign Tools	14
Step 8 – Campaign Launch	17
Step 9 – Evaluate Progress	17
Step 10 – Campaign Conclusion	17
Appendix Resources	19
Appendix A: Leveling Up Your Union's Communications for Member Engagement	20
Appendix B: Sample Membership Survey	22
Appendix C: Sample Membership Analysis and Workplace Diagram	23
Appendix D: Sample Escalation Plan	25
Appendix E: Sample Campaign Outline	26
Appendix F: Potential Objections and Possible Answers	27
Appendix G: Sample "Yeah, But" List	30
Appendix H: Sample Assessment Sheet	32
Appendix I: Sample Campaign Announcement to Members	33
Appendix J: Sample Thank You Letter/Email to Volunteers	35
Appendix K: Sample Welcome Letter/Email to New Members	36

# INTRODUCTION



Member engagement is an essential part of operating a union, whether it's a national or local union or bargaining unit. *Engaging Professionals in their Union: A Guide* is intended to help unions at any level build or enhance their continuous member engagement efforts as well as launch a strategic internal organizing campaign.

Engaging members whether through continuous engagement or a campaign should be viewed as an integral part of a union's work. Unions should always be organizing, whether your union is welcoming new hires, providing training programs, or launching a campaign to boost sign-ups. When organizing is part of your union's DNA you will be able to build the power needed to achieve your goals.<sup>1</sup>

This guide categorizes member engagement into two main parts: continuous member engagement and internal organizing campaigns. The parts will be discussed separately as they are used to achieve different goals:

**Part 1** Develop or enhance your union's continuous member engagement efforts. This part lays out the foundational principles of member engagement, details the strategy and planning necessary to deploy a member engagement program, and delves into the organizer's toolbox with suggestions on the tactics, forums, and programs that your union can use to keep members engaged.

**Part 2** Plan and launch an internal organizing campaign to achieve a strategic goal. This part provides, in 10 steps, the framework necessary to achieve a strategic goal, including building membership density, re-engaging members who have not been in touch with the union, or winning an important change in the workplace.

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<sup>1</sup> A large body of research confirms that member engagement has a positive impact on union effectiveness. For more, see: Clark, P. (2010). *Building More Effective Unions* (2nd edition). Ithaca, NY: Cornell University Press.

# PART 1:

## CONTINUOUS MEMBER ENGAGEMENT

Continuous or ongoing member engagement should not be viewed as something your union does sporadically. Member engagement is an investment in your union's strength and its future. An engaged membership makes for a better workplace and committed membership, which in turn makes it possible for the union to win gains for members.

### FOUNDATIONS OF MEMBER ENGAGEMENT

Successful member engagement programs follow these four simple principles, which serve as a foundation for continuous member engagement.

1. **Engagement starts on day one.** New employee orientations are key to engaging new employees and should include follow-up and other engagement efforts targeted at new members and new employees who are not yet members.<sup>2</sup>
2. **Communication is key.** Identify how members prefer to receive information so that no one is unintentionally excluded from important communications.
3. **Member engagement is a two-way street.** Identify opportunities for members to share their opinions, priorities, and experiences with their union.
4. **Member engagement never ends.** The power achieved with member engagement can only be sustained if member engagement is continuous.

### PLANNING EFFECTIVE, ONGOING MEMBER ENGAGEMENT

The structure of a union's member engagement program should be thought-out in advance to ensure that all components fit together. If your union already has a member engagement program, it should be evaluated using the elements below. The following elements help to ensure a member engagement program can achieve its goals and is sustainable over the long term.

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<sup>2</sup> For more information and planning effective new employee orientation programs, see the DPE resource: "Growing Your Union: Engaging Professionals Through New Hire Orientation."

## Vision and goals

- Convey a vision to your members and leadership that explains why your union is investing in member engagement and what you will be able to achieve with a more engaged membership.
- Develop achievable goals and identify a way to quantify success. For example, providing new hire orientation to all new hires and developing a follow-up process that results in each new hire receiving three different contacts from the union. For ongoing engagement a goal could be sponsoring eight different events each year or making sure every member receives one contact per quarter from a union officer or steward.

## Structures and resources

- Create sustainable structures that will support ongoing member engagement, like a member engagement committee that has dedicated funding and reports to union leaders on a regular, pre-defined basis.
- Identify union staff that will support your member engagement committee or member engagement work. Provide resources that will make your member engagement work successful.

## Member communications

- Develop a plan to communicate with members about the work of the union and opportunities to get involved. APPENDIX A can help in the development of a plan.

## Engagement strategy

- Develop and deploy a strategy to reach new, active, inactive, and non members. Consider individualized outreach and surveys to identify the types of events and programs that will appeal to members.

## Data tracking

- Determine how to collect members' contact information and keep it up to date.
- Utilize systems to track member contact information, activity, and event attendance.

## Feedback and evaluation

- Measure progress and solicit feedback from members to periodically reevaluate your member engagement program.

# THE ORGANIZER'S TOOLBOX: TACTICS, FORUMS, AND PROGRAMS TO ENGAGE MEMBERS

Unions with successful engagement programs utilize most of the following tools in their organizer's toolbox. The below tactics, events, programs, and communication tools are complementary to one another.



## One-on-one conversations

One-on-one, in person, conversations are the bread and butter of any organizing and engagement effort and allows members to develop genuine relationships with union leaders and vice-versa. Member-to-member conversations help the union efficiently identify a person's level of support for the union and make specific requests such as signing a membership card, participating in a workplace action, or joining a committee.



## Phone banking and texting

Direct communications through phone banking and texting programs are a great way to invite members and potential members to events or ask them to participate in surveys and other initiatives.



## Workshops, webinars, and programs

Workshops, webinars, and programs are generally focused on a single topic, aiming to provide in-depth information to members about a specific issue or union benefit that is relevant to them. Examples include:

- **Informational.** Provide information about the union as well as practical information to members. See examples here: <https://actorsfund.org/workshops> and here <https://www.sagafta.org/tax-returns-and-working-actor>.
- **Educational.** Establish the union as a resource for professional advancement and learning. See examples here: <https://www.wgaeast.org/upcoming-events/> and here <https://www.aft.org/education/aft-teach>.
- **Mentorship.** Build connections between tenured and new members within the context of the union. Mentorship programs can help develop and identify new rank-and-file leaders and make sure new members can turn to someone they trust to help navigate the workplace without relying on human resources or management. See examples here: <https://aft6157.org/full-time-faculty/mentorship-program/> and here <https://www.usw.ca/districts/6/mentoring>.

- **Legislative and political.** A great way to engage members that want to register other members to vote, lobby on the union's legislative and political priorities, and recruit members to take action. See an example here: [https://www.iatse.net/sites/default/files/how\\_to\\_establish\\_a\\_local\\_union\\_phone\\_text\\_banking\\_program.pdf](https://www.iatse.net/sites/default/files/how_to_establish_a_local_union_phone_text_banking_program.pdf).
- **Leadership development.** Build the bench of capable and qualified union leaders, including stewards, committee chairs, officers, and other roles. See an example here: <https://www.iaff.org/altshr20/>.



## Social media

An important forum for distributing information to members, engaging directly with individuals and building a sense of union identity and activism.



## Newsletters and other announcements

Regular communications from the union help keep members informed about the activities of the union. Before starting a newsletter, be sure your union has the capacity to publish the newsletter (in print or via email) on a regular, recurring basis.



## Food and drinks

A time honored way to encourage participation and recruitment for in-person union programs is to provide refreshments. From union meetings to social events, food and drinks help break the ice and boost turnout. Social events focused around food or drinks can also help to boost engagement without the pressure of a union meeting or other agenda-driven events. Building informal member-to-member and leader-to-member connections helps develop a culture of engagement and union identity.



## Union swag and giveaways

An important forum for distributing information to members, engaging directly with individuals, and building a sense of union identity and activism.



## Traditional union meetings

Provide opportunities to bring many union members together to discuss the business of the union, provide updates about negotiations, union benefits or other initiatives, and solicit input from members. However, it is important to understand that meetings designed primarily to conduct the business of the union are not typically effective at engaging inactive or new members.



# A NOTE ABOUT ACCESSIBILITY

Barriers may exist that prevent some members from attending in-person union meetings and programs, including the time and location of meetings, the need to secure childcare, physical access needs, etc. Where possible, sessions should be recorded for replay and incorporate accommodations such as real-time captioning.





# PART 2:

## BUILDING AN INTERNAL ORGANIZING CAMPAIGN

An internal organizing campaign is a planned campaign designed to help the union achieve a strategic goal. The goal could be signing up non-members, organizing members to take action to put pressure on management during contract negotiations, or win passage of a piece of legislation.

The steps outlined below can help your union develop an internal organizing campaign to accomplish any number of priorities. Done effectively, internal organizing leads to more committed, engaged members and a stronger union.

### 1. PREPARATION AND ANALYSIS



### 2. DEVELOP CAMPAIGN STRATEGY



### 3. DEVELOP CAMPAIGN STRUCTURE



### 4. RECRUIT A TEAM OF VOLUNTEERS



### 5. CREATE A PLAN TO ACHIEVE CAMPAIGN GOALS



### 6. IDENTIFY PERSUASIVE CAMPAIGN MESSAGES



### 7. IDENTIFY CAMPAIGN TOOLS



### 8. CAMPAIGN LAUNCH



### 9. EVALUATE PROGRESS



### 10. CAMPAIGN CONCLUSION



# STEP 1 - PREPARATION AND ANALYSIS



Assess the union's ability to successfully undertake a campaign. The union will need strong, active leadership, sufficient activist members to undertake the campaign, as well as an understanding of the membership, workplace, and employer.

## Identify campaign purpose or goals

Clearly define the campaign's purpose or goal and be able to communicate the reason the internal organizing campaign is necessary to members, non-members, and others. In the event you need to survey members to determine priorities, tips and a sample member survey is in APPENDIX B.

## Assess support for the campaign

Identify whether union leaders are willing and able to launch and sustain an internal organizing campaign, including the financial resources necessary to create materials and give out union swag. Also, assess whether you have enough members willing to undertake the necessary work (one-on-one conversations, record keeping, etc.).

## Evaluate strengths and weaknesses

Determine the union's strengths, which will help create campaign messaging and assess how to create goals that fit into the overall campaign. This could include:

- Strong collective bargaining agreement;
- Effective worksite representation structure;
- Record of grievance wins;
- Labor-management cooperation;
- Popular social activities; or
- Strong communication tools (website, social media presence, newsletter, etc.).

Accurately assess and work to remedy the union's weaknesses. For example, lack of communication, irregular meetings, lack of union visibility, missing or incomplete contact information for all bargaining unit members; and lack of union access to all areas of the workplace.

## Employer considerations

If you are launching an internal organizing drive in anticipation of upcoming bargaining, assess the employer's financial situation, stability, customers, product, or competition; then, leverage that information in your campaign. Plan to show that a strong union works to the benefit of the employer. The employer may also be susceptible to outside pressure from customers, community organizations, or political leaders.

In addition, identify information that may be used to persuade potential members to join and existing members to take action. For example, the union may have had stronger gains when member density was higher. The union should also assess the potential for employer resistance to the internal organizing drive and evaluate potential responses.

## STEP 2 - DEVELOP CAMPAIGN STRATEGY



With the purpose or goal of your campaign in mind, devise a strategy that will help you achieve your desired outcome. If your goal is to sign up non-members, then your strategy to accomplish that could be to recruit volunteers to have one-on-one conversations with each non-member. Also, work through the tactics needed to accomplish your campaign purpose or goal.

### Define your target audience

For an internal organizing campaign meant to boost membership, your target audience will be all potential members in the bargaining unit. However, for a campaign to boost member engagement ahead of contract negotiations or another key bargaining unit-wide event, your target audience will be all members and non-members.

### Diagram the membership and workplace

Develop an understanding of the current state of the membership and where members are currently working. APPENDIX C provides an example of how to analyze membership and diagram the workplace.

### Strategy for contacting members

Every person in the target audience must be contacted. The number one reason people do not join the union or remain inactive is because no one ever asked them to join the union or become active.

Whether you are recruiting new members, activating existing members, or both, you should start by contacting those who are considered to be “low-hanging fruit,” either because they were never asked to join the union or have been active in past campaigns. Having early success should give your campaign momentum and provide volunteer organizers with the practice and confidence they will need to tackle tougher prospects. Knowing the state of membership and where members currently work can help inform your union’s strategy for contacting members.

## Chart anticipated campaign actions

If your campaign is being organized to put pressure on an employer during contract negotiations or around other issues, you should develop a plan that gradually escalates your tactics over time. Starting with low-risk, low-pressure tactics can help organize members into the campaign over time and demonstrate the need to take greater action to achieve the campaign goal. While it is important to survey members to assess the types of tactics that members would be willing to pursue, members may also become more willing to take higher-risk, higher-pressure actions if it becomes clear that lower-risk actions are not putting enough pressure on management. APPENDIX D includes a sample escalation plan.

## Stay organized

As you develop your strategy, keep track of necessary information by creating a campaign outline that includes contact information, start and end dates, goals, tactics, etc. A sample campaign outline is included in APPENDIX E.

## STEP 3 - DEVELOP CAMPAIGN STRUCTURE

Successful campaigns need clear structures to make sure all the necessary tasks get done and goals can be met. Develop a plan to enlist a campaign coordinator and additional co-campaign coordinators from within the union, if necessary.

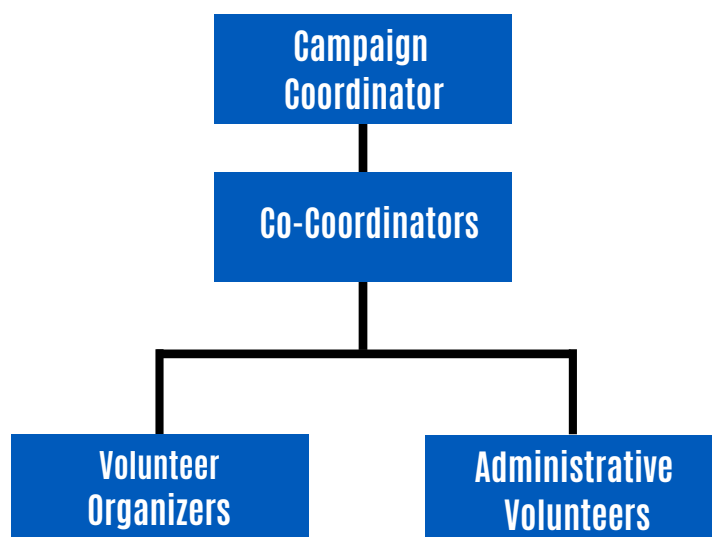
Campaign coordinator's responsibilities:

- Recruit volunteer organizers from your membership who will have one-on-one conversations with fellow members and potential members;
- See that all volunteers, including volunteers serving administrative functions and your volunteer recruiters are trained and properly equipped; and
- Make certain that all potential bargaining unit members are contacted and that all contacts are recorded.

Local leadership should identify the best person for the campaign coordinator job. Generally, the local president or staff executive director should not also be the campaign coordinator.

The campaign coordinator may need to recruit co-campaign coordinators in order to fully execute the campaign and assist with managing the organizing and administrative sides of the campaign. The following page contains a sample of how your campaign team might look. Ultimately, your campaign structure may need to be adapted to fit the existing structures of your union. Essential tasks for your campaign coordinator and co-coordinators, as well as other local leaders include:

- Hold times and place for regular check-ins;
- Establish systems to hold coordinators and volunteers accountable to your goals;
- Identify new potential volunteers; and
- Devise incentives to reward high-performers.



The number of volunteer organizers you need will depend on your campaign, but consult the diagram created for your membership and workplace in Step 2 and APPENDIX C to determine how many volunteers your campaign needs to be successful.

## STEP 4 - RECRUIT A TEAM OF VOLUNTEERS

Volunteer organizers and administrative volunteers should be recruited on the basis of their leadership potential as well as position within the bargaining unit. Volunteer organizers need to be comfortable approaching and talking with their colleagues, while administrative volunteers should be detail oriented and comfortable using technology to track campaign data.

### Recruiting volunteers

Communicate that the campaign is going to be fun, educational, exciting, fulfilling, and successful; and you believe that this particular individual can improve the campaign and help build power for the union to make their workplace even better. The simplest and most effective way to enlist volunteer recruiters is for the campaign coordinator to ask them personally.

### Scope of volunteer responsibility

Be enthusiastic, but specific about what you are asking of the volunteer. Volunteers should have fun, a sense of responsibility, and clarity about the task and amount of time involved.

## Volunteer diversity

Volunteers should reflect the diversity of the bargaining unit, both by occupation/job classification and personal identities, including age, race, and gender. To the people you approach with an ask, whether it is to join the union or take action, the campaign's volunteers are the face of the union. You want every person to be able to see themselves in the union.



## STEP 5 - CREATE A PLAN TO ACHIEVE CAMPAIGN GOALS

The campaign coordinator should work with the entire organizing team, including volunteer organizers to discuss how the campaign's goal(s) can be achieved. Use the initial diagram of the membership and workplace created in Step 2 to evaluate the task at hand. Working with volunteer organizers to build consensus on specific campaign goals and the plan to achieve them will motivate volunteers with a sense of ownership. Campaign goal(s) should be SMART:

- Specific
- Measurable
- Attainable
- Realistic
- Time-bound

An example of a SMART goal is to “increase membership to 80 percent by August 31 of this year,” while an example of a goal that is not SMART is to “increase membership to a higher level.” By comparing the two examples you will notice the former is specific, measurable, and time certain (whether the goal is attainable and realistic depends upon the individual case), while the latter is fairly vague.

Other examples of SMART goals include a plan to “circulate a petition for 30 days starting July 1 to get signatures from 70 percent of the bargaining unit asking the employer to bargain for diversity, equity, and inclusion language” and a goal to “win pay increases of at least three percent per year in a three year contract.” Again, both of these goals are specific, contain measurable goals, and time-bound. However, whether these goals are attainable and realistic will depend on your union's specific circumstances.

The plan to execute the goal should detail the campaign tools that will be utilized (see Step 7) and the volunteers assigned to complete particular tasks. If applicable, the plan should also include benchmarks for when the campaign is ready to move on to the next tactic or phase. An example of a benchmark could be securing petition signatures from 70 percent of the membership and having 25 members submit photos and quotes to use on social media. Once this benchmark is completed, you move to the next phase of the plan, for example, hosting virtual rallies.

When the plan is set, it is a good time to develop and fill in dates on a campaign calendar. The campaign calendar should include the start and end dates of the organizing campaign and dates and times to check in on campaign progress and assess whether campaign timelines should be adjusted.



## STEP 6 - IDENTIFY PERSUASIVE CAMPAIGN MESSAGES

With your campaign goal and target audience in mind, create a core set of messages that will allow volunteer organizers to speak with a unified voice. Messages should clearly highlight issues that are important in your campaign and should be concise, understandable, and appealing to a broad base of the target audience. Consider testing your messages with a small group of members to confirm they resonate.

Campaign messages should be:

- **Achievable.** The union does not want to find itself in a position of making promises it cannot keep.
- **Understandable.** Campaign messages should be easy for all bargaining unit members to understand.
- **Avoid conflicts.** Campaign messages should be designed to resolve problems, not create conflicts.

Campaign messages should also inoculate against management's anticipated response to your campaign. By countering these messages early, you can help the membership resist employer attempts to weaken support for the union and your campaign. Inoculation should start early and happen often, providing multiple opportunities for members to understand what they might hear from their employer and how the union is responding.

## STEP 7 - IDENTIFY CAMPAIGN TOOLS



Once you have a plan and have identified persuasive messages, you'll want to identify the campaign tools that will help you disseminate your messages, train your volunteers, and track progress.

### Communication tools

Campaigns will likely need to employ multiple modes of communication to reach all the audience members. The specific platforms you utilize are not as important as having a defined strategy and a clear plan for how you are going to use your tools. Communication tools include:



- One-on-one conversations. No tool is more effective in an organizing campaign. Consider supplementing with one-on-one video conferencing like Zoom or phone calls if members are disinclined to use video conferencing.
- Email platforms to send out e-newsletters, action alerts and other messages. Examples of platforms include Action Network and Mailchimp.
- Peer-to-peer or broadcast texting platforms reach members and non-members alike. However, FCC regulations govern the use of these tools and you may be required to gather explicit opt-ins in order to use these tools. Examples of platforms include Hustle, ThruText, MobileCommons, and Action Network.
- Social media graphics that show union pride and demonstrate the union's strength, including Facebook profile frames, Zoom meeting backgrounds, and profile photos for internal workplace user profiles on email programs or Slack.
- Physical mailers, newsletters, and flyers, especially in workplaces where remote work is not an option.
- Printed campaign materials that help focus or guide the volunteer organizer's message and can be left with members for further review after a conversation. Materials should be high-quality and free of typos.

## A note about campaign materials

Campaign materials can include content about union accomplishments, campaign issues, value of a strong union, benefits of membership, history of the union, and contact information for the union. Be sure to post about the campaign progress on the union's website, social media, blog, or any other space where members might be reached.

## Volunteer training tools

Provide an orientation that will review the volunteers' role, responsibilities, and how they will contribute to the overall success of the campaign. Orientations should include training on campaign tools where necessary and practice leading organizing conversations, including:

- **Sample organizing conversations.** To help volunteer organizers communicate clearly with members, develop sample organizing conversations based on the messages and issues developed in Step 6. The strongest conversation outlines will allow individual volunteers to integrate their personal experiences and speak directly to members' specific concerns. Organizing conversations should always remain friendly and positive, include inoculation against employer messaging, and include a direct ask (to join, sign a petition, etc.).

- **Responding to objections to joining the union.** If your campaign is directed at signing up or engaging inactive members, responding to potential members' objections about the union can be challenging. Volunteers who practice responding to objections are more likely to feel comfortable and prepared when faced with objections. APPENDIX F includes sample objections and potential responses.
  - Another tool your volunteers may find helpful is the “yeah, but” list. The list is used to provide guidance to volunteer organizers who may hear the same objection about joining or taking action with the union multiple times. A sample “yeah, but” list with responses is in APPENDIX G, but the campaign team should make its own as well.

## Data tracking

Effective data tracking is essential so the campaign coordinator can have an accurate picture of where the campaign is at a given time, see the progress the campaign has made, and make plans to follow-up. The most important part of any tracking system is the ability of volunteer organizers to report progress and give updates after every one of their organizing conversations. Numerous options are available for unions to track campaign progress, from programs like Action Builder to Excel spreadsheets and even paper tracking systems.

Be sure and develop a rating system that quantifies the level of a contact's support or opposition to your campaign. Your rating system may differ based on the type of campaign you are running. For example:

For a recruitment campaign, the ratings should be based on the following:

1. Committed to join the union and is in the process of doing so.
2. Likely to join the union, but more follow-up needed.
3. Unlikely to join but should still be followed up with for additional conversations.
4. Unlikely to join and should not be contacted again during the campaign.
0. Unknown or not yet contacted.

For a campaign designed to boost engagement, the ratings should be based on the following:

1. Actively engaged in the union and committed to take additional action.
2. Committed to taking action but is not yet active.
3. Not committed to taking action and more follow-up is needed.
4. Opposed to taking action with the union. Should not be contacted again during the campaign.
0. Unknown or not yet contacted.

All volunteers should be trained on your system of assessment so they understand its importance and share a uniform understanding of how to rate contacts. The actual entering of assessment sheet information into a database or Excel is a good job for an administrative volunteer. A sample assessment sheet is included in APPENDIX H.

## Step 8 - Campaign Launch



The campaign is ready to be launched. You have done everything you can to get your internal organizing plan to this point. If appropriate for your campaign, let the membership know that you are launching an internal organizing campaign and clearly communicate the overall goals of the campaign. You can find a sample campaign announcement in APPENDIX I.

Make sure all volunteers have their assignments, including members they are assigned to talk to, phone lists they are assigned to call through, or social media they are tasked with creating and posting.

## Step 9 - Evaluate Progress



The campaign coordinator should set regular check-ins with co-coordinators and volunteers to periodically evaluate your campaign, including tools, progress towards goals, and changes to the campaign environment. Remember that the campaign plan you start with may need to be changed to meet your goal(s). Having regular opportunities for campaign volunteers to share their ideas and feedback will help them feel empowered as volunteer leaders and will provide important information to the campaign coordinator who may need to make adjustments.

## Step 10: Campaign Conclusion



Always close out campaigns with a wrap-up meeting and document your thoughts to help those who will be running the next campaign.

- What went well?
- What could be improved?
- What information can be used for the next campaign?

### Celebrate your success

Utilize your union's communication tools to widely celebrate and promote the campaign's success. Depending on your campaign this could mean demonstrating the success you had at the bargaining table or the increase in membership achieved with a campaign to sign up non-members.

### Volunteers

Thank everyone who was involved in the campaign. Thank them individually and in writing, and make sure to include appreciations for their work in communications with the full membership. APPENDIX J includes a sample thank you letter/email to volunteers.

## New members

If you were running a recruitment campaign, make sure to send a welcome letter to all new members and have a plan for one-on-one follow-up, ideally with their assigned steward. The best practices for new hire orientation apply to welcoming new members who join the union through an internal organizing campaign. A sample welcome letter is included in APPENDIX K. Add new members to email and mailing lists if they are not already on the lists. Work to engage new members by inviting their participation in the local or sending them surveys to gauge opinions on local activities and workplace issues. Keep them up to date on local activities to make sure they know their union is working for them.

## Keep organizing

Internal organizing does not end just because a campaign is over and your goals have been achieved. Union leaders should identify the structures that should remain in place to continue the work of organizing new members or engaging with the existing membership. You should also consider recruiting some of your top volunteers to join your member engagement committee. The principles of member engagement outlined in Part 1 of this guide will be critical as you plan for ongoing member engagement and internal organizing efforts.

# APPENDIX RESOURCES

## A:

Leveling Up Your Union's Communications for Member Engagement

## B:

Sample Membership Survey

## C:

Sample Membership Analysis and Workplace Diagram

## D:

Sample Escalation Plan

## E:

Sample Campaign Outline

## F:

Potential Objections and Possible Answers

## G:

Sample "Yeah, But" List

## H:

Sample Assessment Sheet

## I:

Sample Campaign Announcement to Members

## J:

Sample Thank You Letter/Email to Volunteers

## K:

Sample Welcome Letter/Email to New Members



# APPENDIX A:

## LEVELING UP YOUR UNION'S COMMUNICATIONS FOR MEMBER ENGAGEMENT

- **Establish a communications lead/communications committee.** If your local does not have a staff member dedicated to communications, a member or committee of members should be responsible for communications-related tasks. Set clear expectations and responsibilities for each committee member and provide training, set up regular check-ins, and establish a dedicated communications channel (email or text group) for quick approvals.
- **Audit your union's communications infrastructure.** Evaluate what your union currently has and doesn't have (website, social media, email lists, etc.) and determine what needs to be updated and/or created.
- **Create a union name and logo.** If possible, brand your union with a name and logo that reflects who the membership is. A name and logo will allow members as well as potential members to identify the union easily. For example, if your union is MEPO Local 222 and you are a union of librarians in Washington state you might name your union the Washington Library Professionals Union and create a logo that includes a book.
- **Create/update your website.** All union locals should have a modern-looking website that can be easily updated and includes relevant, timely information for members, prospective members and the public.
  - **Website domain name:** If you don't have one, claim a website domain name that reflects your local's name, acronym, or name abbreviation. Ideally, your website domain should be fairly short and easy to remember.
  - **Website layout and content:** Websites should allow your membership and potential members to easily access information that is relevant to them. It is best to populate your website's homepage with content that will not go out of date to avoid constant updates. Additionally, include a contact page, so members and potential members can easily get in touch with your union.
  - **Pictures:** The union is your members, and you want to make sure website visitors see that. Your local should gather photos of your membership (at work and at union activities) and use them throughout your website.
- **Create/update social media accounts.** Determine which social media platform(s) (Facebook, Twitter, Instagram, TikTok) your members or potential members are on and create an account if your union doesn't have one.

- **Name and handle:** Use a consistent version of your union's name and create a consistent handle for all of your union's social media accounts. Your handle could be the same as your website domain name. For example, DPE's handle is @DPEaflcio on all social media platforms, DPE's website domain is dpeaflcio.org, and DPE's name across social media platforms is Department for Professional Employees, AFL-CIO. Be sure to keep in mind character limits when creating handles and names on social media.
  - **Photo and cover photo:** Use your logo as your main profile picture, but resize your logo for each social media platform (you can find social media image sizes here: <https://sproutsocial.com/insights/social-media-image-sizes-guide/>). Additionally, create a graphic or use a photo of your members for your social media accounts' cover photos.
  - **Fill out the entire profile:** Fill out everything when creating social media accounts (about/bio, website, phone number, email address, etc), and be sure to standardize this information across your accounts.
- **Create a social media plan/calendar.** Establishing and building a following on social media accounts requires posting content regularly. Planning content and creating a social media calendar can help make this easier.
    - **Develop a social media routine.** Plan to post on your social media accounts regularly. Regularity could be different depending on the social media platform. For example, you should tweet or retweet from your Twitter account multiple times per day, while posting on Instagram could occur once a day.
    - **Create graphics for holidays/important dates.** Identify important dates like anniversaries, holidays, and days of recognition and plan social media for these dates.
    - **Put together a bank of pictures and quotes of members for graphics.** Gather pictures and quotes that can be used in graphics to create evergreen content for days when news stories and other sources of content are slow.
    - **Plan a regular (weekly/monthly) solidarity day on social media.** You can use your social media accounts for member engagement while also using your membership to create social media content by establishing a regular solidarity day. The solidarity day could include members posting a picture of themselves in a union shirt or button with a sentence or two about why they value their union. To increase participation, your union can have a raffle every month and enter those who posted on social media for the solidarity day.
  - **Let your members know about your different communications tools.** Members can't use and engage with your union's listserv, social media accounts, or website if they don't know about them. Make sure to spread the word about all the different ways they can engage and communicate with their union.
  - **Tools and platforms for union communicators:**
    - Website hosting and design: Squarespace and Weebly
    - Graphic Design: Canva
    - Social Media Management: Tweetdeck



# APPENDIX B:

## SAMPLE MEMBERSHIP SURVEY

Depending on your campaign, it may be important to survey the bargaining unit to identify issues members want the union to take action on. Surveys also help members know that the union is listening to the membership and working hard to improve the workplace.

If you plan to survey membership on a regular basis, consider surveying a representative sample of the membership at any given time, so that members do not get overwhelmed with surveys. The union should communicate survey results to the full membership where appropriate to be transparent about the results and how the data shapes union priorities.

Surveys and questionnaires can be facilitated several ways, including:

- SurveyMonkey ([www.surveymonkey.com](http://www.surveymonkey.com)), Google Forms (<https://www.google.com/forms/about/>) and Jotform (<https://www.jotform.com/>)
- Paper surveys and questionnaires can be distributed at union meetings as a complement to or in place of online surveys. Bargaining unit members can then fill them out at the meeting and return them to a designated place or person.

**Sample Questions.** The sample questions below are designed to help you get started drafting your own survey questions that are tailored to your chosen audience and designed to produce actionable information that will assist your internal organizing campaign.

### EXAMPLE 1:

Question: What should the union's priorities be during the upcoming negotiations? Rank your top 3 picks with 1 having the highest priority.

- ☐ Wages
- ☐ Privatization
- ☐ Job safety
- ☐ Training
- ☐ Health insurance
- ☐ Job security
- ☐ Improving diversity, equity, and inclusion
- ☐ Pension / retirement plan
- ☐ Promotions
- ☐ Overtime
- ☐ Other \_\_\_\_\_

### EXAMPLE 2:

Question: What workplace benefit that the union negotiates do you most value? Rank your top 4 picks with 1 having the greatest benefit.

- ☐ Ability to voice concerns
- ☐ Preserve professional integrity
- ☐ Job safety
- ☐ Training
- ☐ Professional development
- ☐ Health insurance
- ☐ Influence with management
- ☐ Fair scheduling
- ☐ Job security
- ☐ Pension / retirement plan
- ☐ Fair promotions
- ☐ Wages
- ☐ Fair job evaluations
- ☐ Other \_\_\_\_\_

# APPENDIX C:

## SAMPLE MEMBERSHIP ANALYSIS AND WORKPLACE DIAGRAM

What your membership analysis and workplace diagram look like will depend on the goal of your internal organizing campaign and your workplace. If your campaign goal is to sign up potential members, it would be helpful to generate a list of active members and potential members. Your list of active members could be used for volunteer recruitment and your potential members are your organizing targets.

If your goal is to increase engagement ahead of bargaining, you might want to create a list of active, inactive, and potential members with the goal of utilizing active members to both engage inactive members and recruit potential members.

Here is one way to classify members:

- Active members: Members who regularly attend meetings or other events, may serve on union committees, and will respond to action alerts, surveys, or other communications.
- Inactive members: Members who do not actively engage outside of paying dues.
- Potential members: Non-members who could be recruited to sign up as a dues-paying union member.

### Membership Analysis - Sample

#### Active Members (7)

Adam Jones  
Bill Jones  
Cheryl Jones  
Dave Jones  
Edith Jones  
Fran Jones  
Gary Jones

#### Inactive Members (6)

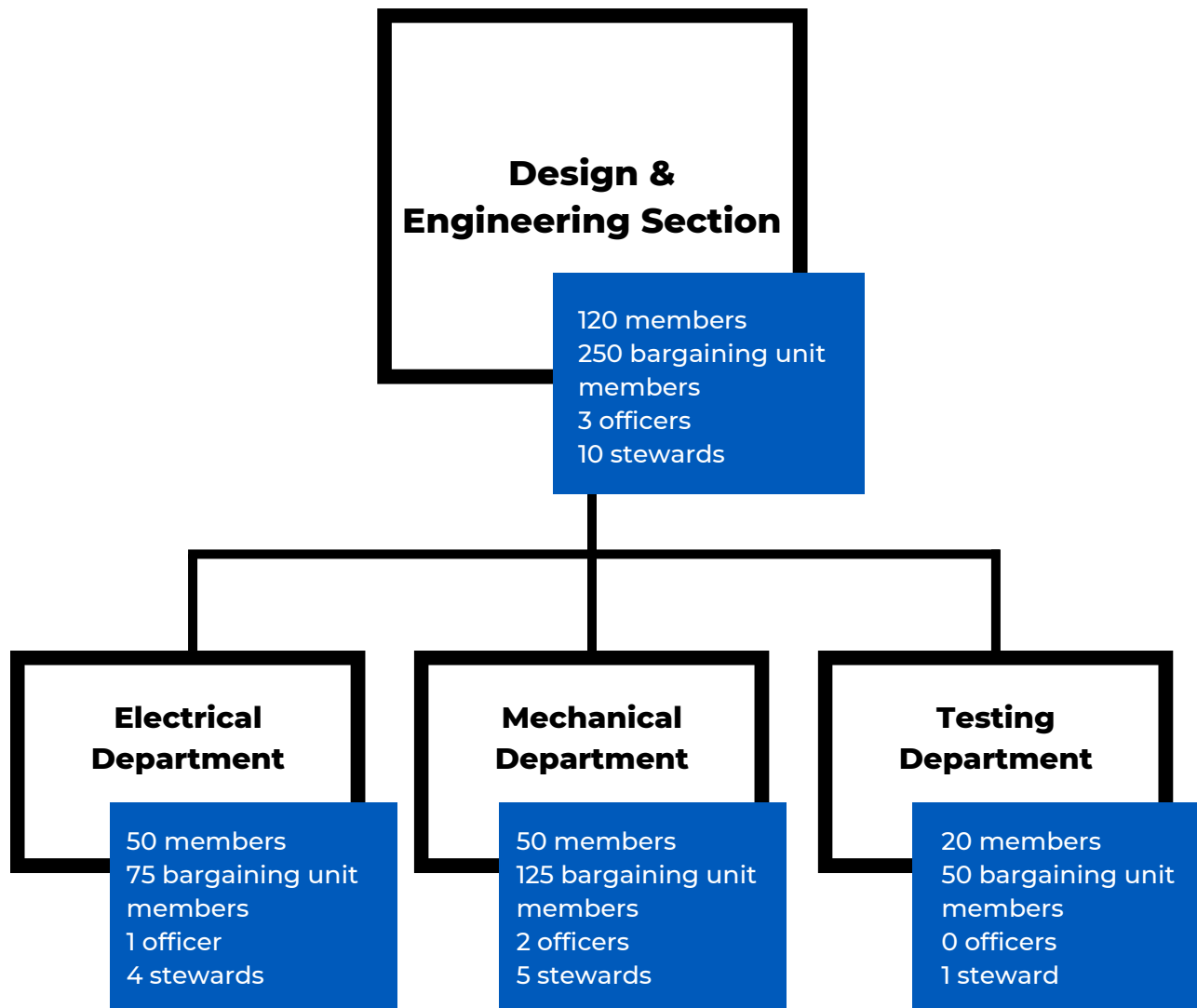
Kathy Garcia  
Linda Garcia  
Mary Garcia  
Nancy Garcia  
Owen Garcia  
Paul Garcia

#### Potential Members (7)

Andy Smith  
Betty Smith  
Carrie Smith  
Dana Smith  
Ethel Smith  
Frank Smith  
Greta Smith

## Workplace Diagram – Sample

Diagrams similar to the sample below may help to determine strengths and weaknesses in your membership and then help you distribute resources in your internal organizing campaign. Your diagram could be compiled in a number of ways, for example, instead of sectors and departments, your diagram could be based on work location (floor, for example), projects worked on, or member job functions.



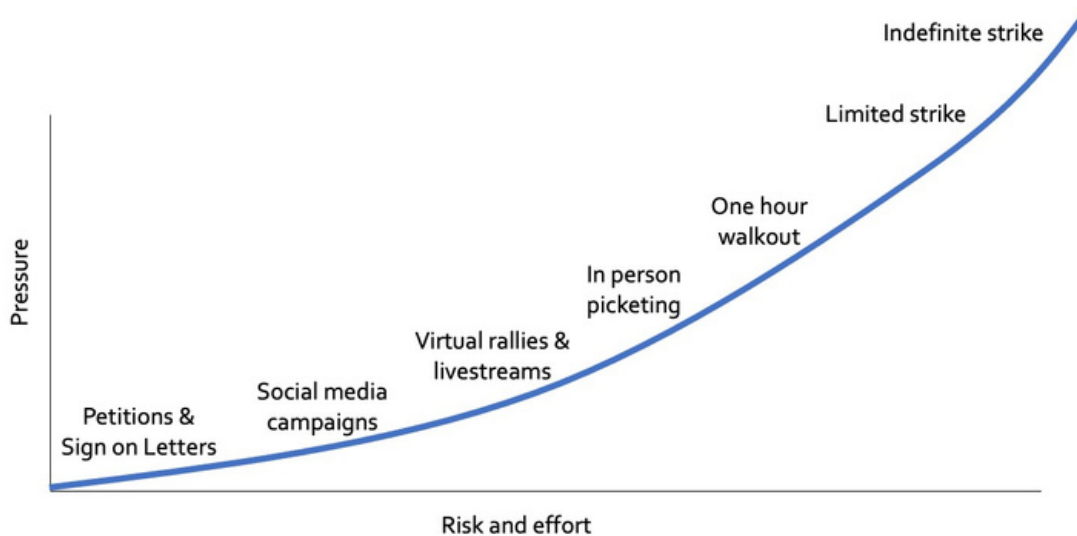
# APPENDIX D:

## SAMPLE ESCALATION PLAN

Campaigns that aim to win certain contract provisions or other improvements may require a gradual escalation in campaign tactics. For example, if your aim is to urge the employer to adopt gender neutral bathrooms, your campaign strategy might follow these steps: a petition signed by 75 percent of bargaining unit members; a social media campaign; and visible workplace displays of solidarity, like buttons or stickers. If the employer continues to resist, the chart below can help plan for additional escalation tactics.

When planning these tactics, it is important to consider the willingness of members to engage in these actions. While you can run successful social media campaigns with only a small portion of members actively participating, walkouts or strikes require close to universal participation in order to be effective.

Sample Escalation Plan - Contract or issue campaign



# APPENDIX E:

## SAMPLE CAMPAIGN OUTLINE

Local name: \_\_\_\_\_

Mailing address: \_\_\_\_\_

Local President: \_\_\_\_\_ Email: \_\_\_\_\_

Work phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Campaign Coordinator: \_\_\_\_\_ Email: \_\_\_\_\_

Work phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Campaign Co-Coordinator: \_\_\_\_\_ Email: \_\_\_\_\_

Work phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Campaign start date: \_\_\_\_\_ Campaign end date: \_\_\_\_\_

### CAMPAIGN PURPOSE/GOAL

---

---

### VOLUNTEER RECRUITMENT PLAN

---

---

### CAMPAIGN TOOLS TO BE DEVELOPED/USED

---

---

### INCENTIVES FOR VOLUNTEERS

---

---

CAMPAIGN WRAP UP MEETING DATE: \_\_\_\_\_

# APPENDIX F:

## POTENTIAL OBJECTIONS AND POSSIBLE RESPONSES

Responses to objections posed by potential members should be brought back to your campaign's central message. For example, if a potential member says I can get all the benefits without paying, then your response may be, "It will be harder to win pay increases in the upcoming round of bargaining if we don't have everyone's support." Here are some potential objections and possible responses:

**OBJECTION:** Why should I join the union when I'll get exactly the same wages and benefits without joining?

**POSSIBLE ANSWERS:**

1. "Your colleagues need you in the union. Our standing together will make our union more effective for all of us."
2. "We could achieve so much more if everyone was a member. Gains can only be won if we can show management we are united."

**OBJECTION:** "I can't afford to join. My check just isn't big enough."

**POSSIBLE ANSWERS:**

1. "Finances are tight for most of us and that is why we need you to join the union. If we stand together we can get the pay increases we deserve and improve our fringe benefits, which will mean more money in our pockets."
2. "The union works hard to keep dues low. However, we must have financial resources in order to be successful in negotiations and ensure that the full terms of the contract are enforced."

**OBJECTION:** "I'll think about it. Maybe I'll join someday."

**POSSIBLE ANSWERS:**

1. "Let's do it right now. Don't put something off that needs to be done today."
2. "Here's a card. Why don't you sign it and attend our next orientation or event? That's the best way to learn about the union."

**OBJECTION:** "I don't need a union; the employer is fair. What has the union gotten for us that we wouldn't have gotten anyway?"

**POSSIBLE ANSWERS:**

1. Highlight important contract wins and point out that the employer often admits that the union forces them to grant more than they would like to. You may want to use a prepared sheet showing the union gains over the years.
2. "We are glad you are doing well and have no problems with your supervisor. However, some of your colleagues may not be as fortunate and need a fair process for resolving problems. We rely on everyone in the workplace to support one another and make sure anyone can succeed in this workplace."

OBJECTION: “I don’t intend to stay in this position forever; I’m looking for a promotion.”

POSSIBLE ANSWERS:

1. “Our primary focus is to ensure our members get the recognition they deserve. We will do everything we can to get you any transfers or promotions that you are entitled to. We work to prevent subcontracting and privatization, so our members have more advancement opportunities.”
2. “That’s great. Many people currently serving as supervisors or in other management positions are former union members who were recognized by management for their potential, and were supported by their coworkers in order to advance.” (if true)

OBJECTION: “I’m only going to be working here a short while (on temporary or part-time job).”

POSSIBLE ANSWER:

“While you are with us, we want you to be one of us. We want you on the team and get all the benefits you deserve. You will enjoy the job more and we will enjoy having you.”

OBJECTION: “The union doesn’t do anything for you (grievances are not settled satisfactorily).” Or “I don’t like the people who are running things in the union.”

POSSIBLE ANSWER:

Insist upon specifics. Check out the issue, obtain the facts and report back to the potential member.

OBJECTION: “The union just protects poorly performing employees and I’m not a poor performer.”

POSSIBLE ANSWER:

The union does not protect poor performers. The union only ensures that the employer follows the rules set out in the contract to ensure people are treated fairly. It’s in no one’s best interest for the union to protect poor performers. We all want the employer to be successful.

OBJECTION: “I don’t want anything to do with unions. They’re all corrupt.”

POSSIBLE ANSWERS:

1. “Our union is made up of us and our coworkers here. You know us and know we are honest, hardworking professionals.”
2. Point out that membership in the union gives them a right to choose officers and to correct any abuses that exist.



# APPENDIX G:

## SAMPLE “YEAH, BUT” LIST

The type of responses you will get from internal organizing targets may vary depending on the type of internal organizing campaign. Volunteers should be ready with an answer that addresses a bargaining unit member’s concerns within the context of a given campaign.

*“Yeah, but I don’t get in trouble. Why do I need a union?”*

The union does a great deal more than work on discipline cases. Our main focus is to ensure our members get the recognition and dignity they deserve. We will do all we can to help you get any transfers or promotions you may be entitled to. We are very concerned about enhanced skills training and actively oppose subcontracting and privatization.

*“Yeah, but I can represent myself.”*

Sometimes you can be too close to a problem to handle it properly by yourself. In any case, your concerns will have more weight when you have the full backing of your colleagues. Also, the union has access to information on other departments that may determine the outcome of your problem. Even the country’s best defense lawyers hire a lawyer to handle their personal cases.

*“Yeah, but you have to represent me whether or not I’m a member.”*

That’s true and we will do our best. However, arbitrations and legal proceedings cost a lot of money. A union can make a decision not to proceed to arbitration for financial reasons. If everyone pays their fair share, then we’d be in a better position to take on the important battles without being concerned about the financial strain.

*“Yeah, but I get everything a member gets, don’t I?”*

While the contract covers everyone in our bargaining unit, our union’s ability to win additional gains at the bargaining table is directly related to our union’s strength and ability to mobilize our members. We are all more likely to get larger pay increases, better benefits and improved working conditions if we can show management that we are unified.

*“Yeah, but the union is too involved in politics.”*

Our union is involved in politics because the decisions that our elected officials make on a regular basis are too important not to be involved. Every year there is important legislation heard at the local, state and federal levels that impact our ability to do our work well and provide for our families. We always poll members before making endorsements and we encourage members who want to get more involved in these efforts to join our political action committee.

*“Yeah, but all that matters is what happens at the bargaining table.”*

Our success at the bargaining table comes from the power we hold in our workplace. When our employer knows that we're united in achieving a strong contract, we are more likely to win those gains. Taking action to show our employer that we're serious will send a message that will resonate in these negotiations.

*“Yeah, but if I sign the petition, the employer/supervisor will single me out for retaliation.”*

You are legally protected from retaliation since this petition is about improving our working conditions. Also, many of your colleagues have signed the petition and we will not submit the petition to the employer until we have a strong majority. Our goal is to get 70 percent of the staff to sign. The union will always stand with you if there are any attempts to retaliate.

# APPENDIX H:

## SAMPLE ASSESSMENT SHEET

Employee's name (First & Last): \_\_\_\_\_

Home address: \_\_\_\_\_

Work phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_

Personal email: \_\_\_\_\_

Department: \_\_\_\_\_ Job Title: \_\_\_\_\_

Longevity at employer: \_\_\_\_\_

Hobbies or interests: \_\_\_\_\_

Other useful info:

### FIRST CONTACT

Date: \_\_\_\_\_ Contacted by: \_\_\_\_\_

Comments: \_\_\_\_\_

Assessment: 1 2 3 4 0

### SECOND CONTACT

Date: \_\_\_\_\_ Contacted by: \_\_\_\_\_

Comments: \_\_\_\_\_

Assessment: 1 2 3 4 0

### THIRD CONTACT

Date: \_\_\_\_\_ Contacted by: \_\_\_\_\_

Comments: \_\_\_\_\_

Assessment: 1 2 3 4 0

Assessment scale:

1 = Strong support

2 = Likely to support, but more follow-up needed

3 = Unlikely to support, but follow-up recommended

4 = Unlikely to support (do not follow-up)

0 = Unable to reach or left message

# APPENDIX I:

## SAMPLE CAMPAIGN ANNOUNCEMENT TO MEMBERS

August 1, 2021

Dear Local 100 Member,

In the last few months we have had crucial victories that benefit Local 100 members. Our recent arbitration win as well as our successes in the last legislative session will benefit each of us and our families.

Our success has only been possible because of the support you have shown through your membership in the Local. Your membership, and the membership of your colleagues demonstrates to management and legislators that we are standing together in union to fight for higher wages, improved benefits, and better working conditions. Thanks to your support, it is a fight we are winning.

Numbers mean power. That is why the members of the Local 100 Executive Board have voted to launch a membership recruitment drive during the month of September.

Soon, we will be contacting members to ask them to volunteer a small amount of time to specific projects that serve as the foundation of our recruitment efforts. I urge you to volunteer a few hours of your time to help make our union stronger.

In the meantime, if you have a co-worker who is not a member, please encourage them to join. Use the enclosed membership card to sign them up, and be sure to enter your name on the card as a recruiter.

Thank you again for your support. If you have any questions, comments, or concerns, please contact me or your local steward.

Sincerely,

Jane Smith  
Local 100 President  
jsmith@local100.org  
555-123-4567

## ALTERNATIVE CAMPAIGN ANNOUNCEMENT SAMPLE

August 1, 2021

Dear Local 100 Member,

In the last few months Local 100 has suffered some setbacks. Our recent arbitration loss as well as our low membership numbers make it harder for our union to win important fights. I know if we all work together, we can do better.

Your continued membership, and the membership of your colleagues is the foundation of our union. Together, we will stand in union to fight for higher wages, improved benefits, and better working conditions. Thanks to your support, we are in a position to build upon past gains, despite our recent setbacks.

Numbers mean power. That is why the members of the Local 100 Executive Board have voted to launch a membership recruitment drive during the month of September.

Soon, we will be contacting members to ask them to volunteer a small amount of time to specific projects that serve as the foundation of our recruitment efforts. I urge you to volunteer a few hours of your time to help make our union stronger.

In the meantime, if you have a co-worker who is not a member, please encourage them to join. Use the enclosed membership card to sign them up, and be sure to enter your name on the card as a recruiter.

Thank you again for your support. If you have any questions, comments, or concerns, please contact me or your local steward.

Sincerely,

Jane Smith  
Local 100 President  
jsmith@local100.org  
555-123-4567

# APPENDIX J:

## SAMPLE THANK YOU LETTER/EMAIL TO VOLUNTEERS

August 1, 2021

Dear Roger,

Thank you for all the work you did on the Local 100 membership drive. Your efforts helped us increase our membership by 75 members, which exceeded our goal by 10 members. Thanks to the efforts of you and your fellow recruiters, Local 100 will be in a much stronger bargaining position when our local representatives meet with management. Local 100 is fortunate to have tireless members like you.

Thanks again for all your work.

In Solidarity,

Mark Davis  
Campaign Coordinator  
mdavis@local100.org  
555-123-4567

# APPENDIX K:

## SAMPLE WELCOME LETTER/EMAIL TO NEW MEMBERS

August 1, 2021

Dear Linda,

Thank you for making the decision to join Local 100.

Your support combined with the support of all your fellow members will help ensure the union can continue to fight for [state the campaign issue(s)].

I have enclosed a brochure that discusses many of the benefits you will receive as a Local 100 member.

Local 100 is dedicated to democracy. We want to encourage all members, especially new ones, to get involved in the Local – attend Local meetings, participate in union elections, and make sure that your union understands what is important to you.

If you have any questions, comments, or suggestions about the Local, or if you have any work issues, please contact your steward, or call me or a Local officer at 555-123-4567.

Again, thank you for your support and welcome.

Jane Smith  
Local 100 President  
jsmith@local100.org  
555-123-4567



# DEPARTMENT FOR PROFESSIONAL EMPLOYEES DPE

DPE's other guides include:

- *Growing Your Union: Engaging Professionals Through New Hire Orientation*
- *Guide to Organizing Professionals*

Visit [DPEaflcio.org/resources](http://DPEaflcio.org/resources) for more information about DPE resources and materials for affiliated unions.

**The Department for Professional Employees, AFL-CIO (DPE)** is a coalition of 24 national unions representing over four million professional and technical employees. DPE provides support to affiliated unions to build stronger individual unions and foster collaboration between unions of professionals to help create a stronger labor movement.

## **Contact:**

Department for Professional Employees, AFL-CIO (DPE)  
815 Black Lives Matter Plaza NW, 6th Floor  
Washington, DC 20006  
Phone: 202-638-0320  
[www.DPEaflcio.org](http://www.DPEaflcio.org)  
[info@DPEaflcio.org](mailto:info@DPEaflcio.org)  
[@DPEaflcio](https://twitter.com/DPEaflcio)