

CUPE EDUCATION DEPARTMENT

**LOCAL UNION
DEVELOPMENT**

MAY 1994



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INTRODUCTION

Unions tend to be reactive: someone is disciplined and a grievance is submitted; a strike vote is taken in response to an unsatisfactory round of bargaining, etc.

Activists are kept busy responding to the things coming at them from the membership, the employer, and from CUPE. Consequently, most executive members never get around to doing much planning. That's too bad, because many problems that activists complain about such as apathy and lack of militancy can be solved. To become proactive rather than reactive, executive members need to take the time to analyze their problems and then work out a plan to deal with them.

The CUPE Education Department developed this booklet to help executives work out plans for solving problems that they themselves define. The booklet consists of five exercises with a detailed explanation of how to proceed step by step in the planning process.

The exercises will take three or four hours to complete. We suggest that you set aside at least half a day with only this planning exercise on the agenda and meet where you won't be disturbed by phone calls, etc. The exercises don't have to be all done in one session. A flipchart or a blackboard will come in handy to record comments and ideas but are not essential.

Whoever is coordinating the meeting should read through this booklet so that they see how the exercises fit together. If there are any questions, contact your Education Representative.

The people who are best suited to take part are those who will implement the plans you develop. Limit participation to 10 to 12 people so the group doesn't get too unwieldy.

Planning and budgeting are closely related. Secretary-Treasurers should incorporate costs associated with the plan developed in this exercise into their budget estimates.

(1) - VISION

Before you can begin identifying problems that need to be solved, you will have to reach agreement on the purpose of your union local. If you can't agree on why the members pay dues and participate in the affairs of the union, you won't agree on what constitutes a problem and what constitutes a solution.

For this reason, the first step in the planning process is the development of a "Vision Statement". A vision is a one sentence description of the most basic goals of your local union. Why are there unions? What do the members get for their union dues?. Why do people join unions? What does a well run union local do that a poorly run local doesn't do? If there was a decertification vote, what would you say to encourage members to vote for the continued existence of your local?

You will have to reach some agreement about the answers to these questions before you can go on to a more detailed look at how your local operates.

Concentrate on the purpose of your local and not how to achieve the purpose. A Vision is about what the union is about and how it achieves its goals.

Examples of Vision Statements are:

- To help the members.
- To advance the interests of workers.
- To promote equality and fairness on the job.
- To fairly represent all the members of the local.
- To promote solidarity amongst the membership.
- To improve the working conditions and living standards of the members.

Note that none of these examples mentions anything about bargaining, education, striking or communicating with the membership, etc. These words describe how unions represent the members not the purpose of the union.

The purpose of this exercise is to get you discussing the purpose of your local with the other people taking part in this development exercise.

CUPE Education Department
Exercise #1 (a)

VISION

Instructions

This is an individual exercise. Spend a couple of minutes thinking about the purpose of your local union (why does it exist) then write down your answer. Keep it short and simple. If you have trouble coming up with an answer, ask yourself the questions in the introduction to this exercise. Concentrate on why your local exists and not on how it operates.

When everyone has finished, go on to Exercise 1(b).

The purpose of this exercise is to get you thinking about the basic objectives of your local. There are no right or wrong answers.

In my opinion, the basic purpose of our local is:

Exercise 1 (b)

VISION STATEMENT

Instructions

Once everyone has completed the first part of this exercise, go around the room and ask each person to read what they came up with. Have someone keep notes or if you have a flipchart, list each different response.

Once everyone has read out their response, go over the answers and combine those that are similar.

Eliminate anything such as bargaining, communication that deals with “how” questions.

Next, discuss the answers with the idea of arriving at a one or two sentence statement of purpose that you all agree on.

Once you reach consensus, everyone should write the Vision Statement in the space below or have someone write it on a flipchart sheet.

If you have a flipchart or blackboard, post the Vision Statement where everyone can see it so that it can be referred to later.

Vision Statement

We agree that the purpose of our local union is:

(2) - PROBLEM IDENTIFICATION

Once you have worked out a Vision Statement, the next step is to look at the problems faced by your local in light of the basic goal you established in the last exercise. In other words, what problems prevent your local from achieving the goal?

Every local has problems. Only ten people show up at meetings, the same three people do all the work, the members will not come forward with grievances, there is sexism or racial tensions within the local, the members won't support strike action even when their jobs are being contracted-out, etc.

Unions exist to represent the interests of their members. This means having trained stewards in all departments, it means letting the members know how their contract compares with those of other unionized workers, it means keeping the members informed even when they don't show up for meetings, it means encouraging all members to become involved in the local and it means attempting to eliminate barriers to participation such as racist, homophobic or sexist comments in the workplace and at union functions.

The purpose of the next exercise is to suggest problem areas that may require attention. It will be up to you to decide which problems to deal with.

It is important to identify problems precisely. For example, saying that you have a problem with apathy does not suggest a way to solve the problem. On the other hand, saying that there is low attendance at meetings, that it is difficult to find new stewards, etc. makes it easier to develop solutions.

Don't get discouraged if your local has not done some of the things suggested below. The purpose of the exercise is to identify areas that can be improved. This is a problem-solving exercise not a report card!

CUPE Education Department

Exercise #2

PROBLEM IDENTIFICATION

Instructions

This is a group exercise. Have someone read each question. Briefly discuss, then have someone write the group's response or list the problem areas on a flipchart or blackboard.

Don't spend too much time on any one question. The idea is to get you thinking about all aspects of your local. There are no "right or wrong" answers.

A - Union Administration

How many people can be relied upon to do the work of the local? _____

What percentage of the membership turn up at local union meetings? _____

Number of executive positions filled by acclamation at the last election. _____

Did any executive member miss more than 1/3 of the executive meetings? _____

Does each table officer report on their activities at all membership meetings? _____

Does the treasurer produce an annual budget? _____

Has every executive member received training _____

B - Communication

Does your local have union bulletin boards and use them regularly? _____

Do you post meeting notices and agendas on all union bulletin boards? _____

Do you have a union newsletter? _____

Do stewards inform the membership about meetings and important decisions? _____

Do you distribute CUPE publications to the membership? _____

Exercise #2 (Cont'd)

C - Committees (answer Yes or No)

Do you have the following active committees (individuals in small locals)?

- Bargaining _____
- Grievance _____
- Health and Safety _____
- Education _____
- Human Rights, Equal Opportunities, etc. _____
- Social _____
- Other(s) List: _____

D - Participation

Go through the following list and tick off any group that does not actively participate in union activities. If any group represents less than 10 percent of the membership tick off "NA" (not applicable).

Group	Don't Participate	N.A.
Women	_____	_____
Visible Minorities /Recent Immigrants	_____	_____
Aboriginal People	_____	_____
Any major job classification	_____	_____
(If Yes, list classifications) _____		
Any major departments	_____	_____
(If Yes, list departments) _____		

Exercise #2 (Cont'd)

E - Stewarding

- How many work sites or departments have no stewards at this time? _____
- How many stewards have taken a stewarding course? _____
- Over the last two years, how many active stewards have quit? _____
- How many grievances were submitted over the last 12 months? _____
- How many stewards present grievances at the first level? _____
- How many stewards present grievances at the second level? _____
- How many stewards' meetings were held over the last year? _____

F - Bargaining

- Was a bargaining committee struck or in a small local was a member of the executive given bargaining responsibility? _____
- Did bargaining preparations begin at least 6 months before the termination date of the collective agreement? _____
- Was the bargaining committee representative of the membership? (ie. were women, aboriginal people, visible minorities, etc. represented?) _____

- Did all members of the bargaining committee receive training? _____
- Did the committee identify provisions where your contract was inferior to those of other bargaining units? _____
- Did the membership receive information about how their wages and conditions compared with other workers? _____

- Were the members polled about their bargaining priorities? _____
- What percentage of the membership turned up for meetings where bargaining proposals were discussed? _____

- What percentage turned up for the ratification meeting? _____

Exercise #2 (Cont'd)

G - Education

- Does the local have a policy on who will be trained? _____
- Does the local budget money for training? _____
- Do all new employees receive information about the local along with the name and functions of their steward? _____

H - Other

List any other problems that affect your local:

- (1) _____
- (2) _____
- (3) _____
- (4) _____
- (5) _____

(3) - ANALYSIS AND PRIORITY SETTING

After finishing Exercise #2 you should have a complete list of problems that prevent your local from representing the members as effectively as possible. The next step is to go through this list and decide which problem to solve first. This decision is not always obvious especially if you identified two or three problem areas. You will not have the time nor the energy to deal with everything at once. It is much better to deal with one or two minor problems effectively than to take on three big problems and solve none of them.

The problems to work on are those that the members are prepared to work hardest to solve. If you have trouble knowing what to tackle first, ask each participant which problem(s) they are prepared to put time into solving and eliminate the problems that no one is prepared to work on.

We have left space to analyze up to three problems. Do not feel obliged to analyze more than one. This kind of planning exercise should be an annual event. Therefore, the executive can work on any problem not solved this year in the future.

After you have identified the problems you want to work on, the next step is to look into the causes of each problem. For example, you may decide to tackle the problem of not having enough active stewards. To deal with this problem, you must first learn why the local had trouble recruiting stewards in the past. How has the local tried to recruit stewards? Was everyone offered training? Was there any support or recognition for stewards? Has there been a high turnover of stewards? If so, has anyone talked to those who quit to find out why? Without answers to these kinds of questions it would be very difficult deciding what the local could do to increase the number of active stewards.

CUPE Education Department Exercise #3

PRIORITY SETTING

Instructions

As a group go through the list of problems in Exercise #2 and pick the one you want to deal with first. If the causes of the problem aren't obvious, list them as specifically as possible.

You may want to analyze two or three problems before deciding which one to tackle first. Do not feel obliged to list or analyze more than one problem.

The best way to develop a list of the causes of a problem is to "brainstorm." This means having someone write all possible causes on a piece of paper or a flip chart as they come up. Let everyone suggest ideas without discussion. After all possible causes have been listed, go over each cause and combine those that are similar. Next, list the causes in order of importance.

Priority #1

Problem:

Causes (in order of importance):

(1)

(2)

(3)

(4)

(5)

Exercise #3 (Cont'd)

Priority #2

Problem:

Causes (in order of importance):

(1)

(2)

(3)

(4)

(5)

Priority #3

Problem:

Causes (in order of importance):

(1)

(2)

(3)

(4)

(5)

(4) - SETTING GOALS

You have now looked at all aspects of your local, picked the most important problems and listed the causes. The next step is to work out a plan to solve the problem. The starting point of any plan is to set goals.

Goals should be as specific as possible. For example, a local may decide that its main problem is the lack of an effective steward network and the causes are not enough active stewards and little understanding of the role of stewards. The goals might be to recruit three new stewards and to distribute a brochure that lists the kinds of problems that stewards are trained to deal with. Goals like this are easy to work towards because they are specific. On the other hand, a goal such as "improve the steward's network" is much harder to achieve because it is vague and doesn't suggest a solution.

As you discuss goals you may decide to change the priorities you established in the last exercise.

**CUPE Education Department
Exercise #4**

GOAL SETTING

Instructions

Go back to Exercise #3 and look at your first priority. Based on your analysis, set one or more goals that will solve the problem. Make your goals as specific as possible.

**Priority #1
Goal(s)**

- (1) _____
- (2) _____
- (3) _____

**Priority #2
Goal(s)**

- (1) _____
- (2) _____
- (3) _____

**Priority #3
Goal(s)**

- (1) _____
- (2) _____
- (3) _____

(5) - STRATEGY

Part of the reason a problem persists is because it looks too big to solve. People don't know where to start.

To deal with this, break the solution down into manageable steps. That way, whoever is working on the problem can make progress by following the steps in the plan.

For example, if your goal is to recruit new stewards, your strategy might look like this:

- (1) Write up a "job description" for stewards.
- (2) Find the dates of upcoming stewards training courses.
- (3) Announce the availability of training courses and a description of the role of stewards and call for volunteers to be trained at the next membership meeting.
- (4) Post a one page appeal for stewards along with a "job description" and dates for training on all union bulletin boards.
- (5) Actively recruit members that you think would make effective stewards.

To ensure your strategy is carried out, assign an individual to be responsible for each task and set a deadline for its completion. Assigning someone to each task doesn't mean that they have to do all the work. It means the person named is responsible for detailed planning, for recruiting volunteers to work on the task, and for reporting on progress to the executive and the membership.

Unless there is little cost, work out a cost estimate for each task. By doing a costing, the treasurer can ensure that there will be enough money to complete the strategy. For example, it costs something like \$1,500 to send someone to a week long CUPE school. Because there may be substantial costs associated with your plans, it is a good idea to incorporate the planning of your local's budget with the development of these strategies.

You may decide that some of the goals established in the last exercise cannot be dealt with because of lack of time, energy or funds. For this reason, feel free to revise your goals and priorities.

This exercise may seem tedious and time consuming, but it is also vital to the planning process. The experience of many organizations is that things don't get done when there isn't a list of tasks with an individual's name and a deadline associated with each task.

**CUPE Education Department
Exercise #5**

STRATEGY

Instructions

Go back to the goals you set in Exercise #4. For each priority, list the steps you will take to achieve the goal. Beside each step, write the name of the person who will be responsible, estimate the cost and set a deadline for completing the task.

Priority #1

Goal #1	Step	Name	Cost	Deadline
	(1)	_____	_____	_____
	(2)	_____	_____	_____
	(3)	_____	_____	_____
	(4)	_____	_____	_____
	(5)	_____	_____	_____

Goal #2	Step	Name	Cost	Deadline
	(1)	_____	_____	_____
	(2)	_____	_____	_____
	(3)	_____	_____	_____
	(4)	_____	_____	_____
	(5)	_____	_____	_____

Goal #3	Step	Name	Cost	Deadline
	(1)	_____	_____	_____
	(2)	_____	_____	_____
	(3)	_____	_____	_____
	(4)	_____	_____	_____
	(5)	_____	_____	_____

Exercise #5 (Cont'd)

Priority #2

Goal #1	Step	Name	Cost	Deadline
(1)				
(2)				
(3)				
(4)				
(5)				

Goal #2	Step	Name	Cost	Deadline
(1)				
(2)				
(3)				
(4)				
(5)				

Goal #3	Step	Name	Cost	Deadline
(1)				
(2)				
(3)				
(4)				
(5)				

Exercise #5 (Cont'd)

Priority #3

Goal #1	Step	Name	Cost	Deadline
(1)				
(2)				
(3)				
(4)				
(5)				

Goal #2	Step	Name	Cost	Deadline
(1)				
(2)				
(3)				
(4)				
(5)				

Goal #3	Step	Name	Cost	Deadline
(1)				
(2)				
(3)				
(4)				
(5)				

(6) FOLLOW THROUGH

You now have a detailed plan for dealing with the major problems facing your local. The next step is to present the plan to the membership for comments and approval. At subsequent meetings, those responsible should report on their activities.

In addition, there should be discussions on how the plan is progressing at every executive meeting.

Since it is impossible to anticipate the future, most plans will have to be modified after they are developed. The cost estimates will be wrong, someone will lose interest, a crisis will emerge that will sidetrack everyone.

When things do not go according to plan, don't throw out your plan, revise it! If someone has not done what they said they would do, change the deadline or the person responsible for the task. If the plan is not leading you closer to your goal, reanalyse the problem and develop a new set of tasks.

Appoint someone to act as a troubleshooter. The troubleshooter is responsible for seeing that everyone does what they said they would do, for finding additional help if anyone is bogged down and for leading discussions on how a plan can be modified if things are not working out.

(7) GETTING HELP

The solutions to some problems are not always obvious. If you get stuck, turn to your CUPE Representative for help and advice. Almost all representatives have years of experience as union activists. They have had to deal with almost any problem that you are experiencing in your local.

Training will be part of the solution to many problems. For advice on which CUPE courses are most appropriate, contact your Education Representative.

For help with equity issues such as sexism and homophobia contact the Equal Opportunity Representative in your province. The Anti-Racism Office in Ottawa can help you with issues of racism.

Staff are there to advise you and supply information. Staff are not there not to tell you what problems to solve or to do the work for you.

Since you will have to continue to run your local while you work on the plan, there will be extra work for the executive. To spread this work around, delegate as much as possible. Call for volunteers when you present your plan to the membership. Tell them what tasks are planned. Ask for volunteers for specific tasks rather than make a general call for assistance. Encourage people to work in groups. It's more fun and it's harder to avoid a work bee than to start a task alone. Smart executives delegate as much work as possible and spend their time helping those who volunteered and in troubleshooting problems.

Anyone who works on these plans should be recognized, praised and thanked at membership meetings.

Conclusion

There is more to becoming proactive than sitting around answering a bunch of questions and working out some plans. You will still have to do all the things that already keep you busy on top of the work that you have planned in these exercises. And the plan may not work the way you thought it would.

The payoff will come when you achieve your goals. Whatever your specific plan, almost anything you do to increase the effectiveness of your local will increase membership interest in the union. If you succeed, you can probably recruit more people to do the ongoing work of the local.

If you choose realistic goals, divide up the work fairly and make sure that everyone does what they said they would do, you will be surprised how much your local will change over the next year or so!

Good luck!