



ORGANIZER

HANDBOOK

Commitment

Talent

Responsibility

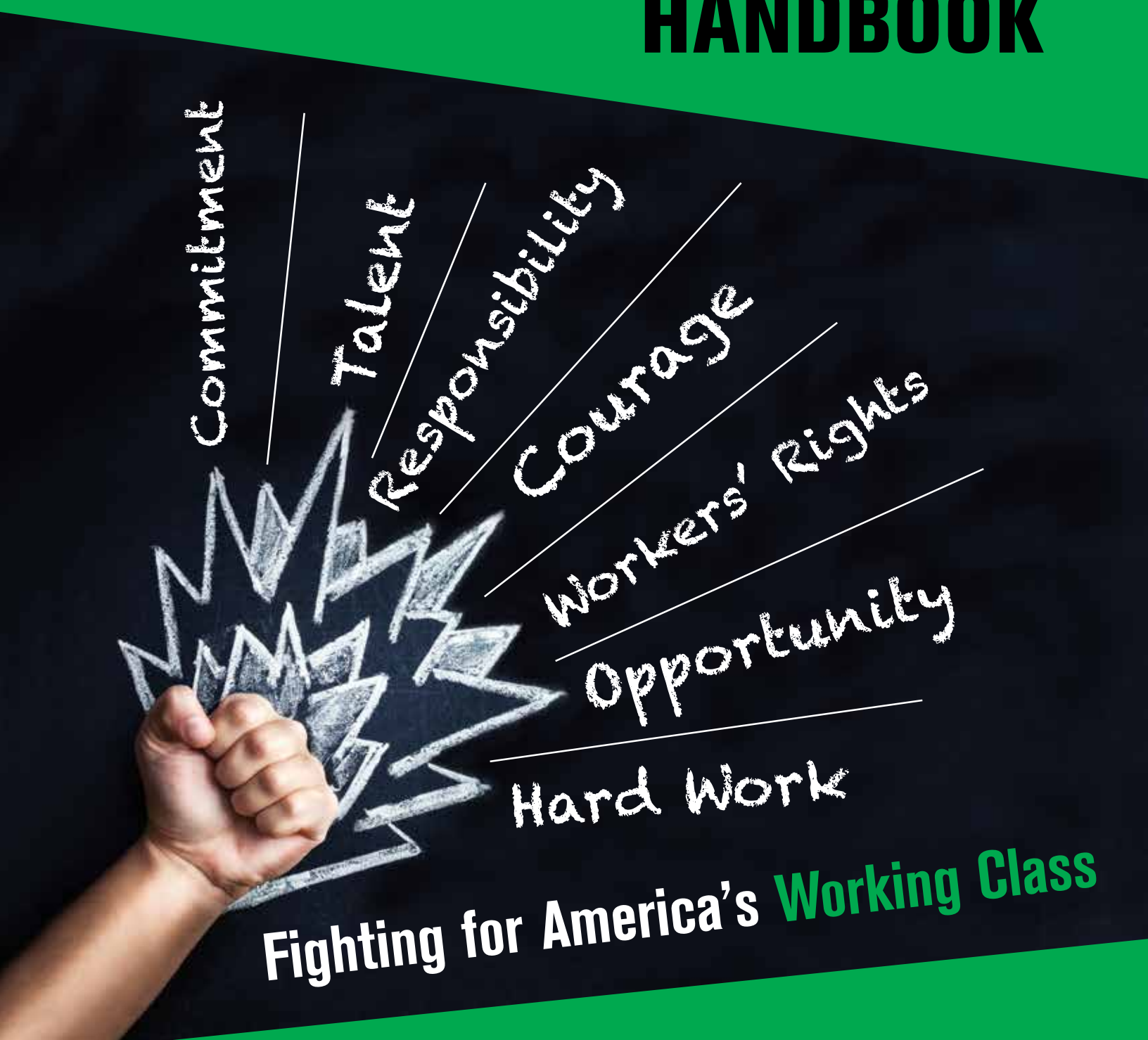
Courage

Workers' Rights

Opportunity

Hard Work

Fighting for America's **Working Class**





Dear Sisters and Brothers,

Congratulations, and welcome to the AFSCME family!

AFSCME has a long history of stepping up when workers need to fight hard. We are in one of those moments in history right now. AFSCME has the resources and strength to rebuild a powerful labor movement. That's why our union's number one priority is organizing.

But let's be honest: Organizing isn't easy. It takes courage to stand up for our rights on the job. It takes lots of one-on-one conversations at work and at home to build our organization. It takes talented and committed organizers who know the ropes and are willing to work hard.

Organizing may not be easy, but it is crucial in our fight for fairness. Seize this great opportunity, this great responsibility and run with it. Working families across this country need you.

You are joining a long legacy of AFSCME organizers, men and women who built this union brick by brick, worker by worker. These are big shoulders to stand on. Do them proud. Do AFSCME members proud. Do yourself proud.

In solidarity,


Lee Saunders


Elissa McBride

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Welcome to AFSCME!

Union organizing is like no other job, and at AFSCME, we find and develop the best organizers in the country. It's safe to say that you'll come out of this year a changed person.

This book will help you navigate the waters of organizing for your first year. It will tell you what to

expect and what is expected of you. You'll be given opportunities to develop your skills in the field, at classroom trainings, at debriefs, and through conversations with your lead and fellow organizers. It's up to you to make the most of these opportunities. The program outlined in this book will help you learn and grow and give you the tools to succeed.



Start Here

The **ORGANIZING**

Institute Apprentice Experience

The AFL-CIO Organizing Institute Apprentice (OIA) training is a 12-week program through which participants learn the basics of organizing while working on a campaign. The OIA period gives everyone involved the opportunity to see if this is the right fit – to make sure you have what it takes to come on staff as an Organizer in Training (OIT), but also to determine if union organizing is something you want to pursue.

During this period, focus on the basics of the campaign and how we organize. Here's your priority list:

Organize workers one-on-one: Learn the five steps of effective house calling and other one-on-one discussions with workers who are organizing their union with AFSCME.

Background, facts and message of your campaign: Why are workers organizing? How will they win? Why is this campaign important to AFSCME members?

“Ride-alongs” with experienced organizers: Try out your new skills, get feedback and incorporate it successfully into your work.

Debriefs: Show you can discuss one-on-one conversations you had. Recount specifics like the motivation, issues, job duties and information about the workplace, coworkers and supervisors. This is also an opportunity to discuss any “roadblocks” you encountered in the conversation, brainstorm different approaches and role play effective ways of overcoming those obstacles.

MONTH

1

MONTH

2

MONTH

3

12 WEEK PROGRAM

Best Advice

from Successful OIAs

"Look at everything as a learning opportunity."

"Ask questions! Don't try and fake it. Ask LOTS of questions!"

"When the lead is looking for people to cover the 6 a.m. shift change, **Volunteer!** Get as much experience as you can."

"Identify the organizer with a positive attitude, who's working the hardest, being the most successful, and contributes the best ideas to the team. **Hang out with them!**"

"Don't get lost in the crowd. **Ask for attention**, show what you are learning. Prove you can and want to be the next best AFSCME organizer."



The Organizer in

TRAINING

Experience



Congratulations, you are now an AFSCME Organizer-in-Training (OIT), and have become part of a very special group of activists! With your new title, you will still need to complete a nine month probation, with trainings, evaluations, ride-alongs and added responsibilities.

The OIT period (combined with the 12-week OIA) is a one-year probationary training program in which your job is to focus on learning the basics of the craft of organizing and demonstrate that you are an effective organizer. You will be assigned to one or more campaigns in which you will be required to learn new skills and demonstrate them.

MONTH

4

5

6

7

8

9

10

11

12

*Congratulations!
You're an AFSCME Organizer*

Here's what to expect while you are an OIT:

- **Skills Development Check-Ins:** You will be assigned an experienced organizer who will meet with you every few months to check in on your development and help you focus on the skills and habits you need to be successful.
- **AFSCME Organizer Training School (AOTS):** This is an intensive two-and-a-half day classroom training that focuses on effective one-on-one communications; leadership recruitment and development; the AFSCME organizing model and campaign strategy. Embrace this as an opportunity to learn new skills, practice them, make mistakes in a safe environment and offer constructive feedback to your fellow participants.
- **National Union Orientation:** AFSCME is a large organization, and unions are heavily regulated by the government. As such, you will be expected to fill out a lot of paperwork including your new hire forms, weekly attendance, travel and expenses. This orientation will help you navigate the paperwork, as well as offer you a chance to learn about our union's history and structure.
- **Blitzes:** A blitz is what we call an intense, often quick, period of a campaign. Usually, organizers and volunteer member organizers are brought in from other campaigns to help reach as many workers as possible in a short amount of time. Blitzes are fun, exhausting and a great learning experience for new organizers.
- **Working with Union Leaders:** AFSCME is proud to be a democratic, member-led union. You will have the opportunity to work with members at a variety of levels — sometimes this means working with local leadership, organizing committees or volunteer member organizers (VMO).
- **Written Evaluations:** from a manager mid-way through your OIT, and again toward the end of your OIT.



How to Use This Book

Organizing is both an art and a craft. Part of becoming a good organizer is learning the mechanics (the craft) while also understanding interpersonal dynamics (the art). The craft of organizing can be learned in the classroom, through debriefs, and manuals like this, while the art of organizing can only be learned by years of hands on experience in the field.

Start by taking a look at the Core Skills Worksheet on page 54. These are the fundamental skills that you need to be an effective organizer. This worksheet is designed for you to use with your assigned trainer in regular meetings every three months.

Each core skill has its own chapter. In each chapter you will find a summary of the skill broken down into the behaviors and habits you will be expected to demonstrate to show that you have mastered organizing basics. Also included are tips to help you learn and show that you are proficient in that core area.

The Additional Resources section in the back of this book includes the blank core skills worksheet, a completed sample, feedback forms, tips for preparing for your official evaluation, and the AFSCME Organizing Model. Finally, there is a glossary of common terms.

AFSCME is committed to finding and developing the best organizers in the country and this book is an important part of that commitment. No program or organizer, however, can make you learn and grow as an organizer. The AFSCME Organizer Handbook is your tool for learning through experience and the experience of others. Use it!



The Organizer

DEVELOPMENT

Program Basics



The **9 CORE SKILLS** of a Successful Organizer

- 1. Organize!** Move Workers One-on-One
- 2. Figuring It Out** Assessments and Debrief
- 3. Learning & Growing** Feedback
- 4. Leadership Makes All the Difference**
Building the Organizing Committee
- 5. Building Blocks** Information Management
- 6. Turning Points** Meetings & Actions
- 7. Vision** Message & Communication
- 8. Putting It All Together** Campaign Strategy
- 9. Stewardship** Good Work Habits





Organizer DEVELOPMENT

Meetings

Organizer development meetings are resources for you to check in with and utilize more experienced organizers to help you improve your skills. This program is designed for three check-ins.

Before each meeting reflect on your work and fill out your strengths and weaknesses in each of the core skills. Include examples of where you demonstrated (or didn't) the skill. After you have completed the sheet use the summary box to summarize what you think you are doing well and what you need to focus on. A thoughtful self-analysis of your own work will help you have a productive meeting with your assigned trainer. He or she will do his or her own analysis of your work.

During the meeting discuss each core area and decide together on your priority areas to work on in the upcoming months. Develop a plan for doing so with concrete and specific goals to advance your skills. These should be incorporated into your weekly plans.

The Organizer in TRAINING Year Timeline

OIA Month 1

- Review the Core Skills Worksheet and write down any questions you have
- Ride-alongs with organizers and managers

OIA Months 1-3

- Ride-along with a member of the staff development team
- Written ride-along feedback from another organizer on the campaign
- Attend AOTS

Month 4: First Month of OIT

- Read the Organizer Handbook
- Complete the core skills worksheet and schedule your first development meeting with your mentor
- Ride-alongs with organizers and managers

Month 5

- Ride-along with written feedback

Month 6

- Ride-along with written feedback
- Use evaluation tips in Additional Resources to prepare
- Official evaluation with manager

Month 7

- Ride-along with written feedback
- Complete the core skills worksheet and schedule your second development meeting with your mentor

Month 8

- Ride-along with written feedback

Month 9

- Ride-along with written feedback

Month 10

- Ride-along with written feedback
- Use evaluation tips in Additional Resources to prepare
- Official evaluation with manager
- Complete the core skills worksheet and schedule your third development meeting with your mentor

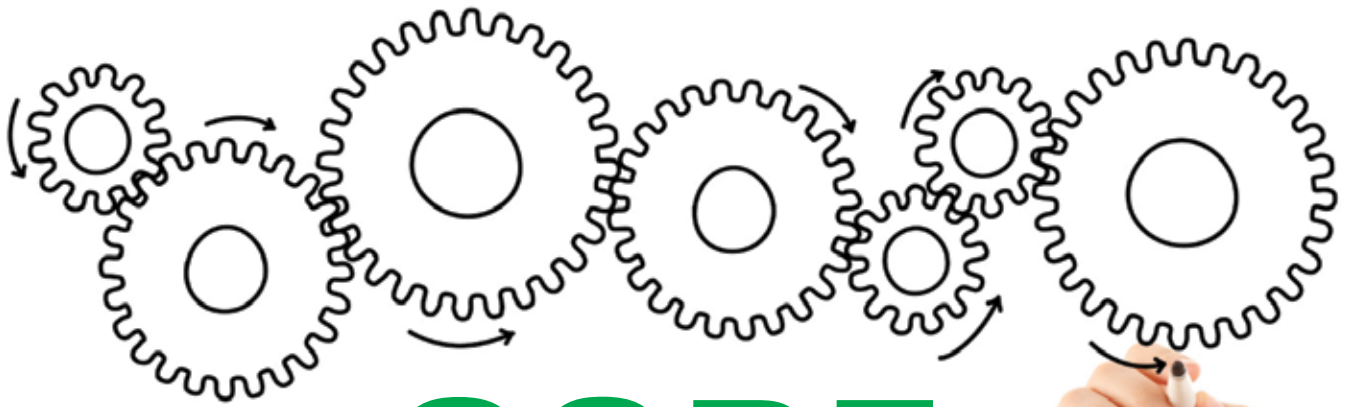
Month 11

- Ride-along with written feedback

One Year: Final decision about promotion to Organizer.








CORE SKILLS



Organize!

Move Workers One-on-One

- ✓ Understands the steps of the agenda and consistently follows the agenda in conversations.
- ✓ Identifies motivation after every conversation.
- ✓ Speaks credibly and inspirationally about the union and campaign vision.
- ✓ Inoculates effectively.
- ✓ Agitates around issues and the need for action.
- ✓ Gets commitment.



Great organizers are great observers. Always think about who's talking to whom, who's in the room, where do workers hang out, who's driving what, who said what. Take notes. Seize opportunities.

The “one-on-one” is where the most important work of organizing gets done. Great one-on-ones are about your ability to relate to workers, be deliberate and skillful and get results.



Know It & Show It

- **Practice!** Get face-to-face with a lot of workers every week. This is the most important part of your job.
- What are you doing and why? Make sure you can **explain** it.
 - What are the steps of the agenda and why are they important?
 - What’s the message on the doors? What’s the inoculation?
 - What did you do in the house visit that made a difference and why did you do it?
 - What didn’t you do that you wished you had?
- **Prove it!** Ask for experienced staff and campaign managers to ride-along with you and prove you can get in the door, consistently follow the agenda, tackle tough situations, ask the right questions and move workers to action.
- Use **role plays** to show you know the basics and that you can identify your weaknesses.
- **Track your numbers.** How are you doing with sign-ups, petitions, turnout? Analyze your results and get specific about what you can do to improve.
- **Observe others** and explain what specific things the organizer did that made a difference moving the worker. Is there an opportunity he missed or something you would have done that could have improved the visit?
- Use **debriefs** to show you are being successful and have a plan.
 - Determine support or opposition to the union in terms of what they said, actions they take, and an understanding of their motivation.
 - Talk about who the worker knows, the relationships and how she fits into the network of leaders.
 - Be clear about what opportunities you may have missed and talk about specific follow-up that’s needed, if any.

Steps of the Housecall


Step	Purpose of Step	Transition Question	Helpful Tips
Step 1. Introduction	<p>Clearly state who you are, where you are from, and why you are there.</p>	<p>"May I come in?" "I'd like to sit down with you to learn what you think about..."</p>	<p>To engage someone who is reluctant, begin the conversation with questions like: How long have you been there? What do you do? Then ask to come in again.</p>
Step 2. Get the Story	<p>We get to know the worker, hear about what work is like for them, what they think could be better. We also get to know how their concerns at work affect them and their families.</p>		<p>Ask fact based and open ended questions. Look for facial and verbal cues to ask follow-up questions.</p>
Step 3. Vision Message Plan to Win	<p>First, we create a vision of the union, the individual powerlessness vs. collective power. We do this by asking the worker these questions. (After we have demonstrated the powerlessness of the individual vs. collective, we move to the next transition question.) With a second transition question, we create a vision of the union by discussing how his/her particular concern could be different if they organized a union. In the second part of the Step 3, we give them the one sentence summary purpose or message for the campaign here and the plan to win.</p>	<p>"What would happen if you went into your boss's office and told him that _____?" and then "What do you think would happen if 300 of your co-workers went in and demanded your boss do something about _____? Do you think it would make a difference?" #2 Then, "Do you know how _____ would be different if you and your co-workers had a union?" End Step 3 with the question: "Does that make sense to you?"</p>	<p>This step is about painting a picture of how a worker comes together with his/her coworkers to address the most important problem he/she identified. This is also where the organizer does the most talking. In this part of the housecall, the organizer should have a clear detailed description of what it will take to build the union.</p>
Step 4. Inoculation	<p>We prepare workers for what the boss may do and say to fight their efforts to organize. We may also inoculate them on such things as another union or anti-union coalitions.</p>	<p>"Is there anything that you think will get in the way of you and your co-workers organizing the union?"</p>	<p>Identify the employer's most effective tactic and develop an inoculation based on that.</p>
Step 5. Assess and Move to Action	<p>Assess the worker's support and willingness to get involved. This is where workers must clearly understand they are making a CHOICE – to work to make things better or to let things stay the same or get worse. We assess workers based on their support for the union. In any campaign, workers have to take action to build their union. There are many actions they can take. Sign a card, contact other workers, house visit with organizers, sign a petition, give a picture and quote for literature.</p>	<p>"Are you ready to join with your coworkers to organize your union?"</p>	<p>If the worker hesitates, ask what is holding them back? Then go back to their concern and agitate. Always agree on a specific follow-up time within a couple of days to check back and see how they did with their assignment.</p>



Figuring It Out

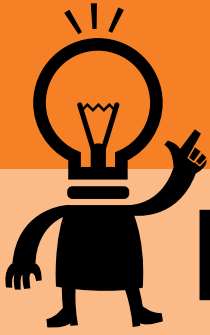
Assessments & Debriefs

- ✓ Accurately assesses workers and defends assessment.
- ✓ Uses AFSCME assessment system correctly.
- ✓ Utilizes assessments strategically to prioritize and plan work.
- ✓ Thoroughly and accurately debriefs conversations.
- ✓ Identifies specific things that would have improved the visit.



If someone tells us he will vote yes but won't sign the vote yes petition, will he support the union? No. If a worker is unwilling to publicly commit, he is unlikely to vote for the union especially if there is a boss fight.

Accurate assessments and detailed debriefs are how we build a strong union that can mobilize to exercise power. These tools depend on thorough one-on-one conversations and inform strategic decisions that help us win.



Know It & Show It

- **Explain the assessment** system to others and why it's important.
 - What are the concrete measures that separate Organizing Committee from supporters?
 - YES votes from undecided?
 - How do we define a GOTV universe?
 - Describe relevant tests that support the rating system.
- **Accuracy.**

Your assessments are backed up with concrete observations. You consistently predict outcomes of votes, petitions and turnout.
- Assessments must **inform** your daily work.
 - Detailed daily debrief.
 - Weekly planning and reporting.
 - Explaining strategic choices.
 - Keeping charts and database updated.
- **Be prepared**
 - Know your numbers and be ready to describe your turf in terms of total universe, breakdown of assessments, including number of unassessed.
 - Be consistent with complete notes and debrief sheets on a daily basis.
 - Show that you can thoroughly and accurately debrief conversations.
 - Identify specific things that you could have done that would have improved the visit.
- Actively **participate** in group debriefs and take notes.



Daily Debriefs

In addition to informing your turf strategy, campaign strategy and message, daily debriefs can be an incredible tool to help you learn the art and skill of organizing.

Here are some tips to help you maximize your debriefs:

- ✓ Have all contact sheets and daily debrief forms completed BEFORE you sit down to debrief.
- ✓ Pay attention to what numerical information your lead and director want you to report.
- ✓ Report any information that is new or hasn't come up before in the campaign.
- ✓ Be prepared to walk through every step of the visit.
- ✓ Focus on what the worker said and how you responded, not how you felt.
- ✓ Defend your assessments with specific backup of what the worker said.
- ✓ Be prepared to explain what you did well and what you could have done differently.
- ✓ Resist making assumptions or ascribing your own fears or hesitations in explaining the workers' motivations.
- ✓ Have a follow-up plan or path forward for each potential leader that you assessed.
- ✓ Identify challenges you had in the field, and get ideas for how to overcome them.
- ✓ Take note of what questions your lead/director asked that did not have answers and make sure you get all that information the next time.
- ✓ Assess how you met or fell short of your goals for the day, and how it changes your daily, weekly or turf plan.

The AFSCME Assessment System

The assessment system is an organizer's road map. Assessments summarize where an individual worker stands on the union, show where a group of workers stand collectively, and form the basis for strategic decisions in the campaign. Assessments help you plan your work by giving you a picture of the support, opposition and possibility for growth in your turf.

Workers' assessments change throughout a campaign based on different 'tests' and benchmarks. Accurate assessments are critical to the success or failure of your campaign.

AFSCME ASSESSMENT SYSTEM

1. Committee

- Demonstrated they lead and move others in support of the union. For instance, they have signed others on cards, recruited others to meetings, and helped undecided coworkers overcome concerns.

2. Solid Union Supporter

- Passed every test.
- If the election were today 2s would vote yes.

3. Undecided or Movable

- May have expressed support, passed some tests (ex., signed a card).
- Must have issues on which we can agitate, but still has concerns/questions/fears.
- Our strategy should be centered on moving the 3s.

4. Not Supporting the Union

- Not only those who tell us they don't support the union but those for whom there is no clear path to move them to support.

Learning & Growing

Feedback

- ✓ Seeks out advice from others on ways to improve skills.
- ✓ Incorporates specific feedback.
- ✓ Gives accurate and concrete feedback to other organizers and VMOs.



Why do we sign membership cards instead of authorization cards on organizing campaigns?

A membership card is a commitment to building the union. It gives us stronger assessments and gives workers ownership in the outcome.

We have important work to do and precious resources to accomplish our mission. We need to be at the top of our game to win. Think critically about your work and the campaign, and develop habits that lead to learning and doing your best work.



Know It & Show It

- **Seek it out!** **Asking for feedback** shows you want to improve. Make it a habit.
 - After home visits
 - During group debriefs
 - Approach the most successful organizer on the campaign for advice
 - Request time with your lead and campaign manager
 - Anytime you go to a new campaign
- **Accept it!** Accepting feedback shows you are willing to learn new skills. Listen, ask questions, ask for examples. Don't argue or be defensive.
- **Use it!** Incorporating the feedback shows that you can improve and that you are learning.
 - During a ride-along, incorporate feedback into your next home visit.
 - Be prepared to describe feedback you got and what you did differently and the results.
 - When someone comes to observe your work, be prepared to talk about what skills you are focusing on.
 - Articulate your strengths and weaknesses on the core skills worksheet and give concrete examples to back it up.
- **Give constructive** feedback to others.
 - Consistently participate in debriefs, staff meetings and one-on-one conversations with peers and new organizers and show that you can think critically.
 - Feedback reflects the principles and practices in the organizing model.
 - Analysis is backed by concrete examples.
 - Communicate in a way that supports the development and learning of others.
 - Describe the best practices of debriefing and giving feedback.
 - Give examples of feedback you have given others, why it was important and the impact it had.

Tips for Feedback

Learning to give effective feedback hones your critical thinking skills and will help you and others get better at what you do.

- **Listen Critically.** Listening to someone else house visit is a great opportunity to think about ways to improve the visit from which both observer and organizer can learn. As the observer, the pressure is off and you can watch the conversation, listen for details and think ahead.
- **Focus on tangible things the organizer did to affect the outcome.** Outcomes are important but we learn by understanding how we got there. We can't control people's attitudes, how busy they are, their past experiences, but we can control what we do in any given situation.
- **Ask Questions.** Start out by asking the other person to critique themselves. Most people are more critical of themselves than others and will no doubt raise any big snafus. This can help you prioritize what you want to say. You may even have a different perspective to offer as the observer.
- **Walk through the visit step-by-step.** This is the simplest way to organize your thoughts after observing someone home visit. For each step of the agenda: Did you accomplish the objective? What did you say? What got in the way? What else could you have done?
- **Don't wait.** Effective feedback comes when the experience is fresh in the mind of the observer and organizer.
- **Prioritize.** If you feel like everything was awful or it all was great, you need to prioritize what you want to say. One way to do this is to follow the order of the house call. If someone is having trouble getting the motivation, they will not be able to agitate effectively around the commitment.
- **Be specific about what works.** Identify what the organizer did or said that made a difference. This allows you and others to repeat what works. "You did a great job moving her to become a member" makes people feel good but does not explain what exactly the organizer did that made her successful.
- **When you identify a problem or something to improve – offer concrete alternatives.** Don't raise a problem without a solution. Always say "Instead of doing X, try doing Y." This gives the organizer something concrete to do that is within her control and gives her the benefit of what you have learned.



Leadership Makes All the Difference

Building the Organizing Committee

- ✓ Accurately identifies natural leaders and activists.
- ✓ Gives appropriate assignments and motivates leaders to complete them.
- ✓ Develops leaders around campaign message, goals, plan and effective one-on-ones.
- ✓ Creates development plan for each leader.
- ✓ Recruits a representative committee of appropriate size.

Leaders have followers.

Activists do the work but can't move others. Always strive to recruit the natural leaders in a workplace, even if they are initially anti-union. Prioritize the real workplace leaders, if you don't you will lose.



Credible leaders are the face of the union, the key to winning campaigns and building sustainable organizations. It is your job to identify, recruit and develop workplace leaders who learn how to organize and can communicate a vision for their union.



Know It & Show It

Know the difference between natural leaders in the workplace and pro-union activists. Apply this knowledge to your strategy and daily work.

- **Assess your turf** in terms of strengths and weaknesses in leadership.
- Reflect this assessment in you weekly goals, plans, reports.
- **Daily debriefs** and weekly plans consistently reflect goals and activity of leaders.
- Charts and database accurately reflect leadership.
- **Evaluate** your committee's individual strengths and weaknesses and identify appropriate goals and next steps.
- **Be prepared** to describe an individual that you developed as a leader, steps you took.
- Show that individual leaders are **successful** at moving the campaign forward.
- Understand the role of the organizing committee and lead that committee. Explain and **teach others** what makes a good organizing committee and its role in the campaign.
- Demonstrate how to prepare for a first committee meeting and the strategic decisions involved.
- **Have a plan** and goals around creation and development of the committee.
- Draft an agenda that is appropriate to the phase of the campaign.
- Show that you can successfully **lead a committee meeting**.
- Demonstrate the skills to successfully train leaders in groups and one-on-one.
- **Be prepared** to give examples of how you moved the committee around a campaign decision, the obstacles, and what you did to be successful.
- Leaders understand the strategy and plan for the campaign and **have ownership** in the decision making and execution.

Building Blocks

Information Management

- ✓ Builds worker lists quickly and resourcefully.
- ✓ Uses updated, accurate and complete worksite charts, database lists and housecall sheets to plan work.
- ✓ Maintains records, housecall sheets etc., in orderly manner.
- ✓ Uses maps and charts to plan work.
- ✓ Uses database to update and retrieve data.
- ✓ Turns in accurate and complete reports.

Never hold an Organizing Committee meeting without organizing tools. Bring your lists, calendar and charts to help the OC understand strategy and develop good decision making habits.



Information management is not just about being detailed and organized, it's about being strategic. It is your job to get the information, make sure it's right and organized in way to reflect what you know.



Know It & Show It

You are responsible for making sure there is a complete and **accurate list** of workers for your turf.

Be prepared to explain what you have and your plan to get what is missing.

Always **chart your turf** to reflect the organization of the workplace, union support and leadership. What do you need to know?

- Work Info: work location, shift, work contact information, who they work with
- Non-work info: phone numbers, email, home address, mail address
- Social networks: who they talk to, listen to, other connections to people and community
- Union support, activity and networks: track assessment, card, record of conversations, OC network, activity with dates

Updates occur daily.

- Database
- Wall charts
- Home visit records

Details matter. Make sure records are accurate and reflect your assessments and reasons behind your assessment.

Consistency matters. Your records should follow the assessment system and protocols for the campaign so the information about your turf can be compared with other parts of the campaign.

Analyze the data and use it to determine strengths and weaknesses and strategies to win.



Turf Organization



An up-to-date worksite list is a critical tool in moving the campaign.

- Each list should represent 100 percent of the workers in that location.
- Have an accurate list with you in EVERY conversation. This will result in better information and help you more effectively build the union.
- If there are missing names from your list – add them and make sure they get in the database.
- If there are names on your list of workers who are not at that location – determine their status and update.
- Each list is identical in content to its corresponding charts: same number of workers, same names, same assessments, etc.
- If you want a list sorted in a particular order – request it.
- Keep track of potential disputed bargaining unit members.



You have a contact sheet for every worker in your turf.

- Contact sheets are organized in a notebook (or several notebooks) by work location.
- Contact sheets should include most recently updated information about the worker.
- Contact sheets should be updated daily to reflect additional contacts, attendance at meetings, activity of the worker in the campaign, etc.
- Contact sheets should correspond 100 percent to your list and charts.



You have a record for every action done by any worker in your turf.

- Organize copies of cards so you can easily verify card signers.
- Ensure that every card signer is correctly identified on your charts and lists.
- Systematically track all other actions such as buttons, stickers, meetings, actions, etc.



Every worker in your turf is on a wall chart.

- Workers on charts are logically organized according to physical location (or other significant relationship)— floor, department, office, geography (if there is no work location) etc.
- Charts represent 100 percent of the workers in your turf.
- Using your charts, anyone should be able to easily identify: who has signed cards, who has been assessed and their assessment, who are the active leaders (OC, activists, etc).
- Charts should be easy to update. Use colored dots for assessments, for example, so that you can easily replace them to accurately reflect the movement in your turf.

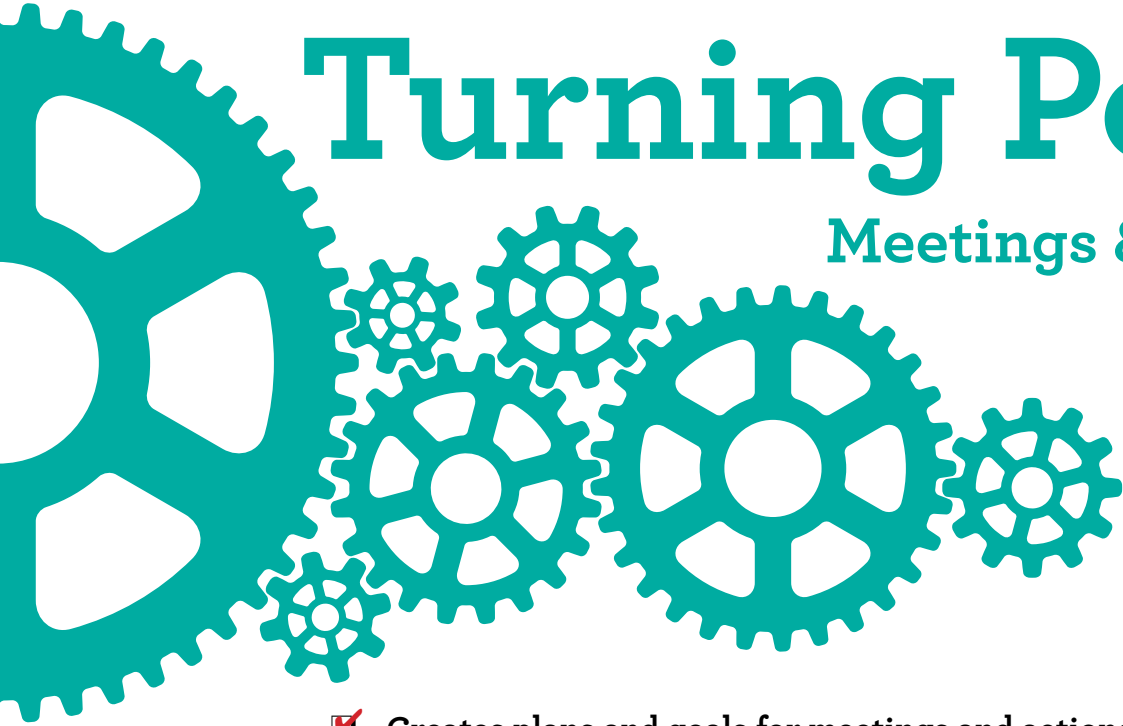
Top things you should know about your turf when “walking the walls” (reviewing your charts) with your lead:

- Why did she sign a card?
- What is the specific evidence behind each rating?
- When is the last time you talked to?
- Who influences her?
- How long has she worked there?
- What has she done to prove she is committed?
- What is her job?
- What do other people say about her?



Turning Points

Meetings & Actions

- 
- ✔ Creates plans and goals for meetings and actions that include leaders and activists.
 - ✔ Sets and meets turnout goals.
 - ✔ Creates and articulates a message that conveys urgency.
 - ✔ Motivates and inspires workers to take action.
 - ✔ Keeps within time frame.
 - ✔ Identifies workable issues for workplace actions.
 - ✔ Confidently and effectively leads actions and meetings and accomplishes goal.
 - ✔ Debriefs actions and meetings and plans for next steps.



Be clear about objectives.

Never call a meeting without a clear consensus about the goal of the meeting and the plan for action.

Meetings and actions are how you show your ability to teach and lead workers in collective action and decision making. These are moments that can move the whole campaign forward and are critical to shaping a democratic union.



Know It & Show It

Detailed Preparation

- What's the plan?
 - Be able to explain the purpose of the meeting or action and how it will be able to move the campaign forward.
 - Have a written message: What's the meeting for, why now, why should I come?
 - Develop a communications plan with goals – before, during and after.
 - Goals should include turnout to the meeting/action, activity for activists and leaders and communication outreach goals.
- Meetings have a clear written agenda that include objectives and a time frame and call to action.
- Leaders are part of the plan, know the message and the goals.

Execution

- Demonstrate that you can follow the agenda, meet objectives and keep to time frame.
- Show that you can deal with curve balls and demonstrate good judgment about dealing with conflict, obstacles and the unexpected.
- Meet your turnout goal.
- Meeting/action inspires workers to take the next action and prepares them for it.

Successful Follow-Through

Demonstrate the habit and ability to lead a detailed debrief which includes:

- Turnout – did we meet our goals and were the right people in the room? Who was missing and why? Follow-up plan for those who committed and did not show up.
- Objectives – did we achieve them and why or why not?
- Detailed plan for follow-up with assignments and deadlines that includes message and communications plan.

Tips for Creating a Meeting Agenda

You've been asked to draft a meeting agenda. Where do you start?

Prepare. Make sure you know the answer to these three questions. If you don't, ask!

(1) Who's coming to the meeting?

There should be a general idea of size, and who is attending, their experience and orientation. Who's your "audience?"

(2) What's the objective of the meeting?

Start with thinking about when workers leave the meeting: What have they accomplished? What have they learned? How do they feel? What are they prepared to do? (This is not a list of things to do at the meeting.)

(3) Why is this meeting so important? Why now?

The answer to this question is the message and urgency of this meeting. To make a meeting worth attending, workers need a reason to attend. A decision needs to be made? Preparing for an action?

Rules to Follow

- Keep the meeting to 1 hour.
- Start on time and end on time, and tell everyone you will.
- Be explicit about the objective and agenda of the meeting.
- Include a training component that gives workers what they need to either make a good collective decision or complete a task.
- Include decision-making – even if it is just an agreement to move forward and take the next step. This builds worker ownership of the plan.
- Include commitment to specific next steps.
- Set time and plan for follow-up.

Sample Committee Meeting Agenda

Like a good housecall, a good meeting involves goals, listening, asking questions, teaching about building the union, moving to action, and giving workers the tools to move forward.

I. Introduction

- Review last week's progress, assess the campaign, plan next steps for this week.
- New introductions

II. Committee Reports

- Boss's campaign
- Leadership recruitment
- New cards/commitments

III. Campaign Updates

- Current assessments
- Areas of focus/weakness

IV. Next Steps

- Mobilize to file
- Turnout plan
- Housecalls to recruit key leaders

V. Commitments

- Small group work to take assignments with deadlines to report back
- Role plays

Tips for Successful Turnout

Getting workers to meetings, actions, and to the vote is an essential organizer skill that you will practice over and over again. Good turnout will ensure a good meeting and successful rally, and win the election! Become an expert. Here's how:

1) What's the message?

- Make sure you understand why the meeting or action is important and can articulate it.
- If you are not sure, ask.
- Write it down. Role-play it.

2) Understand worker networks and engage your committee.

- Besides the urgency, the most important thing that moves workers is the relationship and credibility of the person asking them to come. Who can you move? Who can move others?

3) Set a turnout quota.

- This is your bottom line number, the number of people you personally guarantee will show up. This number must be based on all the realities of the action: time, location, level of heat, opposition and your hard work.

4) Get twice as many commitments as your bottom line number.

5) Put a name to every commitment and chart it publicly.

6) Be disciplined about commitments. Like a “YES VOTE,” a turnout commitment is a worker who:

- Commits to attend in a face-to-face conversation. Have the worker state why it is important for her to attend, and have her confirm the location and time.
- Confirms her commitment at least two additional times before the action, and the last confirmation on the day of the action. Track it.

7) Tell workers the plan — that you are going to contact them again to confirm and that you will do it again the day of the action. (This is inoculation.)

8) Sweat the details to solidify commitments when you confirm. How will you get there? Would you bring someone with you? Need a ride? Track it.

9) Involve workers in planning or turnout for the action. This will increase their commitment to come. How can he help with agenda, room set up, food, list work, volunteer to drive? Etc.

10) Do NOT turn over responsibility of your commitments to others. Phone banks, leafleting, contacts by others all can help. But your bottom line turnout is based on your relationships and credibility with your OC and with workers.



Vision

Message & Communication



- ✓ Understands and articulates the campaign message.
- ✓ Writes clear, concise and on message materials.
- ✓ Applies and uses the message in one-on-ones conversations and meetings.
- ✓ Explains components and strategic choices in a message.
- ✓ Develops and implements communications strategies in turf.



Make the campaign message bigger than workplace issues. Make it positive and capture the greater good worth fighting for.

Message is central to the identity of the campaign and captures beliefs about the union, the workplace and society. Every action you take will require you to create or understand message and communications strategy.



Know It & Show It

- **Write down** the message of the campaign and explain it to others.
- Explain the **strategic issues** around the message. What are the strengths and weaknesses of the message?
- Predict employer or opposition message and **develop** an approach to inoculation.
- Give the **message** verbally and in writing for any campaign activity or event: meeting turnout, response to employer action, union position in bargaining, a particular worker issue, etc.
- Describe the **best practices** of written communications and incorporate into basic written materials with workers as the messengers.
- Create a **communications plan** around a specific event or action in your turf that includes goals for activist and leader activity.
- Include message and how it resonates in **daily debriefs**.

Tips for Effective Communications

- **Frame the debate.**

A winning campaign must frame the debate before the boss does.

- **Move the middle.**

The priority is to persuade undecided workers who will determine the outcome of the election.

- **Be consistent.**

An effective message is the clear, convincing and consistently repeated reason why workers should vote “yes.” It’s the basis for every house call, leaflet, worksite conversation and the guide for all communications.

- **Emphasize one-on-one contacts.**

The best method of message delivery is one-on-one conversations. Use leaflets and social media to amplify face-to-face communications.

- **Put workers out front.**

The most effective print materials include photos and testimonial quotes from workers, such as members of the organizing committee.

- **Don’t “sell” the union.**

Don’t promote the union as a service or a product, such as “Here’s what AFSCME will do for you.” That only validates the boss’s claim that the union is a third party. Use inclusive language like, “We’re organizing with AFSCME to win respect and a voice at work.”









- **Involve the committee.**

Often the most important thing for workers is not what the leaflet says, but who hands it out. Have committee members and other respected workers distribute all flyers.

- **Don’t be strident.**

Remember that leaflets should be drafted from the perspective of undecided workers, not the organizing committee.

Some practical tips for effective leaflet writing:

-  The header is the message. Pretend someone doesn't read the rest of the leaflet when you write the header.
-  Include some graphics or photos to make it easier to read.
-  Keep it short. Only include information necessary to back up your message.
-  Double check for "third party" language.
-  Don't use more than two fonts.
-  Use boldface to emphasize, but pick your key points carefully.
-  Ask someone to proofread and shorten whatever you write.
-  Too much centered text and all caps is hard to read.

WE'RE COMING TOGETHER FOR QUALITY CARE

Across Vermont, homecare providers are coming together to protect the quality care our family members, friends and consumers need. Side by side, we can

- **Have a say in the direction of our programs and our jobs**
- **Protect the services we provide**
- **Assist our consumers in living the lives they choose**

Take the first step in standing up for quality care and respect for the work we do. Become a member of Vermont Homecare United/AFSCME today.

AND STRONGER COMMUNITIES



"I'm joining with homecare workers so that we can have a **voice in the decisions** that affect us and our loved ones."

Julia O'Neill, Personal Care Attendant in Essex Junction



"**We can improve our programs by coming together.** Our communities will be stronger for it."

Kathie Sawyer, Respite Worker in Westford



For more information, contact Vermont Homecare United/AFSCME at 1-866-434-7657, visit www.vermonthomecareunited.org.

Putting It All Together

Campaign Strategy

- ✓ Explains strategic choices in the organizing model.
- ✓ Participates constructively in strategy discussions.
- ✓ Understands and articulates campaign messages, goals and obstacles.
- ✓ Assesses strength and weakness of the opposition.
- ✓ Consistently analyzes and tracks turf and prioritizes daily and weekly work.
- ✓ Suggests workable solutions for overcoming obstacles.
- ✓ Writes turf plan with clear goals and strategy.



Be clear about tactics.

Make sure you know what you are doing and why and can explain it to others.

Campaign strategy requires critical thinking, creativity and a vision. Executing a plan requires discipline, drive and attention to detail. Prove that you can win!



Know It & Show It

Show you understand the campaign and principles of organizing.

- Accurately describe the campaign you are on, the unit, number and type of workers, major issues, and path to recognition. Explain the campaign plan, message and goals of the campaign.
- Give an example of a strategic decision in the campaign and relate it to the organizing model and principles.
- Participate in discussions about the campaign progress and strategy, ask relevant questions and defend organizing principles.

Demonstrate your ability to think strategically on your turf.

- Analyze your turf and prioritize your work based on density, assessments, leadership presence and worker networks.
- Write turf plans with clear goals and a strategy that utilizes a variety of individuals.
- Produce written reports tracking your progress.
- Demonstrate analytical skills to evaluate successes (and failures) of your plan and back up your opinions and decisions with facts.

Prove you can execute the plan.

- Demonstrate with numbers and concrete examples how you have moved your turf to develop leaders, communications networks, activism and membership.
- Meet or exceed the objectives and timeframes agreed to with your campaign lead or manager.
- Timeframes are short so obstacles are identified quickly.
- Solutions are focused on actions you can control and have specific next steps and time frames.
- Other people view you as someone who takes initiative, solves problems and does what it takes to get the job done.

Sample Weekly Turf Plan

Organizer: Darlene Bullock

Date: 1/25/13

Turf: Harbor Tunnel, Toll Collectors

<p>GOALS What do I need to accomplish this week in each of these areas?</p>	<p>ACTIVITY What do I need to do to reach my goals? Who do I need to engage and what will they do?</p>	<p>AREAS OF FOCUS What obstacles to tackle? What help do I need?</p>
<p>BUILD MAJORITY SUPPORT 20 new assessments 7 new Yes votes (cards) Reach 40% yes votes on day shift</p>	<p>Housecalling with at least 3 assessments per day. Work with 2 workplace leaders, Jenny O and Marty M, reach out to 3 people each in their areas to get new cards/assessments from them.</p>	<p>List work with Jenny O and Marty M to ID 6 potential targets for them to reach out to. Will need help from my lead to develop a rap for Jenny and Marty to use. Role play one-on-ones with Marty and Jenny.</p>
<p>REPRESENTATIVE COMMITTEE ID 3 new potential OC Get someone from evening shift, Harbor Tunnel to the meeting.</p>	<p>Go over walk list with Jenny O, Marty M, Carrie Q and John L to identify 3 new people who can serve on MAT and participate in MAT training in February. New MAT members need to be from each job site and each shift.</p>	<p>Getting Carrie and John to find time to sit down with me outside of work.</p>
<p>INCREASE ACTIVISM Get 7 new pictures and quotes for upcoming newsletter.</p>	<p>Get 7 new pictures and quotes for upcoming newsletter from pool of existing supporters. House call card-signers Melvin G, Celeste K, Lee S, Donna W, Robert S, Kevin W, Austin O to check in with them and get pictures and quotes.</p>	<p>Work on rap for moving people past objections on taking picture. Schedule time this week to go housecalling with my lead Casmir C to get some feedback and help on pushing past objections.</p>
<p>WORKER DATA AND CHARTING UPDATED, COMPLETE Chart MAT networks.</p>	<p>Enter contact sheets into database, update wall charts as I make new contacts and assessments. Start chart listing locations and shifts for new MAT volunteers.</p>	<p>Help from Casmir C getting access to the database on my laptop for easier data entry and pack creation.</p>



AFSCME Organizing Principles & Rules That Build Power

Principles of Effective Organizing

- **One-On-One Relationships**
- **Worker Ownership**
- **Strategic Decision-Making**
- **High Expectations & Self-Discipline**

Principle One-On-One Relationships

Rule 1: Organizers should use one-on-ones to build trust and relationships with workers.

Rule 2: One-on-ones should comprise the main part of an organizer's daily work schedule.

Rule 3: Before holding any group meetings with workers, the organizer must have conducted numerous individual meetings to ID and recruit leaders.

Rule 4: All card signers must be assessed through one-on-one contact.

Principle Worker Ownership

Rule 5: Organizing committee meetings should be no more than one-hour long and should always have an agenda.

Rule 6: Every organizing committee meeting has a training component.

Rule 7: Build a committee that is involved in decision-making in the campaign; it is the organizer's responsibility to direct the decision-making process.

Rule 8: Workers must be involved in an action when publicly launching the campaign.

Rule 9: Leadership recruitment never stops.

Rule 10: Workers should always be the public face of the campaign. Meetings with politicians should include workers.

Principle Strategic Decision-Making

Rule 11: Prior to initiating any ground work, have a written plan that maps out the way to win a majority; tracks monthly activities; and considers how to involve members and VMOs.

Rule 12: National union campaigns should begin with a discussion with the appropriate affiliate. The bargaining phase must consider a transition plan, and this plan should include PEOPLE fundraising and encourage voter registration.

Rule 13: Prior to initiating a campaign, evaluate the community and its leaders with a written, specific electoral/political strategy.

Rule 14: Expect the worst. Inoculate. Develop good inoculation materials and messages that educate, yet are neither negative nor defensive.

Rule 15: Set a pace that conveys urgency even when there's no specific opposition.

Rule 16: Build activism with escalating displays of public solidarity.

Rule 17: Use membership cards as authorization cards.

Principle High Expectations & Self-Discipline

Rule 18: Every campaign should have quality daily debriefs.

Rule 19: There should be a training plan and a training component for every staff meeting.

Rule 20: Organizers work in collaboration with the team.

Rule 21: Every organizer should have a weekly plan that includes objective benchmarks.

Rule 22: All of our actions must convey the integrity of our union, and our respect for our members and the workers we are organizing.

Stewardship

Good Work Habits

- ✓ Punctual and willing to work extended hours.
- ✓ Uses union resources wisely.
- ✓ Prioritizes activity and uses time effectively.
- ✓ Takes direction and feedback well.
- ✓ Creates and uses work plans.
- ✓ Handles administrative responsibilities.
- ✓ Takes responsibility for work and actions.
- ✓ Positive member of the team.
- ✓ Represents AFSCME in a professional manner.



Create urgency. Create plans that will require daily follow-up with workers for every component of the campaign.

AFSCME is looking for organizers who represent the best in the labor movement and are committed to our members and our mission. What you do matters.



Know It & Show It

- **Be on time.** Show up when you are expected to and be ready to work.
- Follow through on your commitments.
- Turn in assignments on time and completed.
- Represent AFSCME in **a professional manner** – in person and online. Be aware of what you are saying about union leadership, union staff, members and the workers we’re organizing and to whom you are saying it. Things you say about AFSCME or your work on Facebook, Twitter, on a blog, in an email – can negatively affect your campaign, this union, its members and the labor movement in general.
- **Use union resources wisely.** Always be mindful of where the union’s money (that includes your salary and expenses) comes from. If just \$30 gets wasted, that means one member’s monthly dues were given for naught.
- **Follow the policies** – handle expenses, TAs, reports and attendance professionally, get it done, don’t let it interfere with your work.
- Be productive when you raise concerns or problems.
- **Solve problems** if something is not working on your turf, don’t wait for someone else to tell you what to do. Propose a plan of action that might work. If you don’t know, ask for help.
- **If you goof up, admit it!** Everyone makes mistakes, and you’ll get a lot more credibility for owning up to it.
- Dress and carry yourself appropriately for the work of the campaign.

Weekly Planner

Name: _____ Campaign: _____ Week Ending: _____

GOALS

What do I need to accomplish this week in each of these areas?

ACTIVITY

What do I need to do to reach my goals?

Who do I need to engage and what will they do?

AREAS OF FOCUS

What obstacles to tackle?
What help do I need?

BUILD MAJORITY SUPPORT

REPRESENTATIVE COMMITTEE

INCREASE ACTIVISM

**WORKER DATA AND CHARTING
UPDATED, COMPLETE**

Weekly Scheduler

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

Campaign: _____

Organizer: _____

Week Ending (Sat): _____

Weekly Report: Recognition Campaign

Name: _____ Campaign: _____ Week Ending: _____

Turf Report

	W/E:	W/E:	W/E:
# workers in turf			
Cards/&			
HV/%			
1s (Committee)			
2s (Yes Votes)			
3s (Undecided)			
4s (No Votes)			

Campaign Status: Pre-Petition Post-Petition GOTV

Activity Last Week

Total New Contacts: _____

Cards: _____ 1s _____ 2s _____ 3s _____ 4s _____

Cards from Committee: _____

Activists/OC completed assignments this week: _____

Activist/OC Activity (list names and activity this past week):

Weekly Report:

First Contract & Internal Organizing

Name: _____ Campaign: _____ Week Ending: _____

Turf Report

	W/E:	W/E:	W/E:
Members/%			
Assessed/%			
1s (Committee)			
2s (Yes Votes)			
3s (Undecided)			
4s (No Votes)			
MATS/Trained MATS			
MAT Network/%			

Activity Last Week

Total New Contacts: _____

Cards: _____

1s _____ 2s _____ 3s _____ 4s _____

Cards from Committee: _____

Activists/OC completed assignment this week: _____

Activist/OC Activity (list names and activity this past week):

ADDITIONAL RESOURCES

A. Blank & Completed Core Worksheets

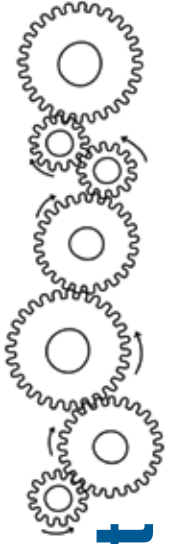
B. Feedback Forms

- One-on-Ones
- Running Meetings & Actions

C. Tips for Preparing for Your Evaluation

D. Organizing Model





The Core Skills Worksheet

OIA/OIT: _____ Date: _____

Organizer: _____ Organizing Director/Field Coordinator: _____

Summary Page (To be completed after you have finished the Core Skills Worksheet.)

CORE Areas Strengths:

Specific CORE Areas of Focus:

Skill Area

Move Workers One-on-One

- Understands the steps of the agenda and consistently follows the agenda in conversations.
- Identifies motivation after every conversation.
- Speaks credibly and inspirationally about the union and campaign vision.
- Inoculates effectively.
- Agitates around issues and the need for action.
- Gets commitment.

Assessments & Debriefs

- Accurately assesses workers and defends assessment.
- Uses AFSCME assessment system correctly.
- Utilizes assessments strategically to prioritize and plan work.
- Thoroughly and accurately debriefs conversations.
- Identifies specific things that would have improved the visit.

Feedback

- Seeks out advice from others on ways to improve skills.
- Incorporates specific feedback.
- Gives accurate and concrete feedback to other organizers and VMOs.

Building the Organizing Committee

- Accurately identifies natural leaders and activists.
- Gives appropriate assignments and motivates leaders to complete them.
- Develops leaders around campaign message, goals, plan, and effective one-on-ones.
- Creates development plan for each leader.
- Recruits a representative committee of appropriate size.

Skill Area

Strengths, Weaknesses, Examples (for your discussion) & Suggestions:

Information Management

- Builds worker lists quickly and resourcefully.
- Uses updated, accurate and complete worksite charts, database lists and housecall sheets to plan work.
- Maintains records, housecall sheets etc., in orderly manner.
- Uses maps and charts to plan work.
- Uses database to update and retrieve data.
- Turns in accurate and complete reports.

Meetings & Actions

- Creates plans and goals for meetings and actions that include leaders and activists.
- Sets and meets turnout goals.
- Creates and articulates a message that conveys urgency.
- Motivates and inspires workers to take action.
- Keeps within timeframe.
- Identifies workable issues for workplace action.
- Confidently and effectively leads actions and meetings and accomplishes goal.
- Debriefs actions and meetings and plans for next steps.

Message & Communications

- Understands and articulates the campaign message.
- Writes clear, concise and on-message materials.
- Applies and uses the message in one-on-one conversations and meetings.
- Explains components and strategic choices in a message.
- Develops and implements communications strategies in turf.

Skill Area

Strengths, Weaknesses, Examples (for your discussion) &

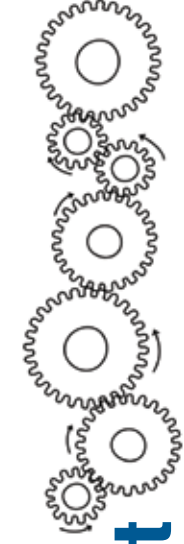
Campaign Strategy

- Explains strategic choices in the organizing model.
- Participates constructively in strategy discussions.
- Understand and articulates campaign messages, goals, and obstacles.
- Assesses strength and weakness of the opposition.
- Consistently analyzes and tracks turf and prioritizes daily and weekly work.
- Suggests workable solutions for overcoming obstacles.
- Writes turf plan with clear goals and strategy.

Good Work Habits

- Punctual and willing to work extended hours.
- Uses union resources wisely.
- Prioritizes activity and uses time effectively.
- Takes direction and feedback well.
- Creates and uses work plans.
- Handles administrative responsibilities.
- Takes responsibility for work and actions.
- Positive member of the team.
- Represents AFSCME in a professional manner.

The Core Skills Worksheet



OIA/OIT: Frank Burgundy

Date: 1/25/13

Organizer: OJ McGillicuddy

Organizing Director/Field Coordinator: Ursula Hightower

Summary Page (To be completed after you have finished the Core Skills Worksheet.)

CORE Areas Strengths:

Frank has steadily improved on his confidence and familiarity with the 1-1 agenda. He is well-prepared and thorough in his nightly debriefs as well as in updating his charts and organizing his paperwork. He gives leaders assignments and explains clearly how to do them. Frank is a positive member of the team.

Specific CORE Areas of Focus:

1. *Moving Workers 1-1*
 - a. *Frank should role play his toughest housecall each day with his lead and role play how he could have more effectively handled the call.*
2. *Strategic Thinking*
 - a. *Frank should think strategically about his turf and define concrete ways to move it. He will review the charts in every committee member conversation, identify where he has no support and develop concrete committee tasks to reach those workers. He will do a weekly plan and a leader chart. He should practice connecting the motivation to the assignments that he asks the committee to do.*
3. *Feedback*
 - a. *Frank must seek out feedback and observation of his work from more experienced staff. Frank should write out the rap and the message, and take notes from each discussion with a more experienced organizer about what he needs to improve. Before each ride-along, Frank should tell the organizer what he is working on improving that day.*
4. *Good Work Habits*
 - a. *Frank needs to be punctual for all work assignments and meetings.*

Skill Area	Strengths, Weaknesses, Examples (for your discussion) & Suggestions:
<p>Move Workers One-on-One</p> <ul style="list-style-type: none"> • Understands the steps of the agenda and consistently follows the agenda in conversations. • Identifies motivation after every conversation. • Speaks credibly and inspirationally about the union and campaign vision. • Inoculates effectively. • Agitates around issues and the need for action. • Gets commitment. 	<p>Frank understands the steps of the agenda, and can repeat those steps back. Frank's confidence has improved on the doors. He has developed a small list of go-to questions that he asks the worker.</p> <p>Frank still struggles with consistently moving the workers to action. He needs to spend more time honing in on what the worker might care about so that he can move them effectively to take action beyond just signing a card. Frank also needs to work on expressing enthusiasm and urgency on the doors.</p>
<p>Assessments & Debriefs</p> <ul style="list-style-type: none"> • Accurately assesses workers and defends assessment. • Uses AFSCME assessment system correctly. • Utilizes assessments strategically to prioritize and plan work. • Thoroughly and accurately debriefs conversations. • Identifies specific things that would have improved the visit. 	<p>Frank has good recollection of the visit and is thorough in his nightly debriefs. He also writes very detailed housecall sheets, including what he has found out about the workers' coworkers, family, and work history. However, Frank struggles with identifying ways in which he could have improved his conversations. He needs to be more self-analytical. He should review the best practices for one-and-ones and makes sure he is following them each time he has a conversation.</p>
<p>Feedback</p> <ul style="list-style-type: none"> • Seeks out advice from others on ways to improve skills. • Incorporates specific feedback. • Gives accurate and concrete feedback to other organizers and VMOs. 	<p>Frank can readily identify feedback that others have given him. He often tries to put it into practice. Frank does not, however, seek out feedback from others. He needs to spend more time asking experienced organizers for help and specific ways to improve. He resists giving any feedback to others as well. For example in the last VMO training, Frank reported every day that the VMOs he rode with were great and had trouble coming up with constructive feedback for them even when others had some concerns.</p>
<p>Building the Organizing Committee</p> <ul style="list-style-type: none"> • Accurately identifies natural leaders and activists. • Gives appropriate assignments and motivates leaders to complete them. • Develops leaders around campaign message, goals, plan and effective one-on-ones. • Creates development plan for each leader. • Recruits a representative committee of appropriate size. 	<p>Frank does a good job walking workers through the steps they would need to complete assignments or commitments on the campaign. For example, last week when a new leader (James) agreed to make phone calls for lobby night, Frank asked him what he thought he might say, and then role played the conversation with him. Frank sets appropriate follow-up times (within 1-2 days) but does not always follow through on timely follow-ups. He has also noted that when he does follow-up the workers have not done what they committed to doing, and he finds that very discouraging.</p>

Skill Area

Strengths, Weaknesses, Examples (for your discussion) & Suggestions:

Information Management

- Builds worker lists quickly and resourcefully.
- Uses updated, accurate and complete worksite charts, database lists and housecall sheets to plan work.
- Maintains records, housecall sheets etc., in orderly manner.
- Uses maps and charts to plan work.
- Uses database to update and retrieve data.
- Turns in accurate and complete reports.

Frank keeps detailed notes, and updates his charts daily. The area where he could improve is in his tracking leader assignments better. If he started a leader chart, he would better be able to track the assignments he gives to leaders, the follow-up plan and the results.

Meetings & Actions

- Creates plans and goals for meetings and actions that include leaders and activists.
- Sets and meets turnout goals.
- Creates and articulates a message that conveys urgency.
- Motivates and inspires workers to take action.
- Keeps within timeframe.
- Identifies workable issues for workplace action.
- Confidently and effectively leads actions and meetings and accomplishes goal.
- Debriefs actions and meetings and plans for next steps.

Frank will have the opportunity to run his first committee meeting in two weeks. He should ask an experienced organizer for help in preparing the agenda and roleplaying the meeting. He should be prepared to ask the organizer who is helping him prepare to come to the meeting. Frank should lead the follow-up discussion with the organizer and ask for specific feedback on each part of the agenda. He should use the Feedback Form for Meetings as a guide for the conversation.

Message & Communications

- Understands and articulates the campaign message.
- Writes clear, concise and on-message materials.
- Applies and uses the message in one-on-one conversations and meetings.
- Explains components and strategic choices in a message.
- Develops and implements communications strategies in turf.

Frank can articulate the campaign message when asked, but doesn't always articulate it well in conversations with workers. For example, in a recent conversation I saw Frank have with a social worker in his turf, his attempt at presenting the message was disjointed, unclear and way too long. He needs to practice the campaign message word for word, as developed by the campaign, so he can clearly and effortlessly explain it to workers when necessary.

Skill Area

Strengths, Weaknesses, Examples (for your discussion) &

Campaign Strategy

- Explains strategic choices in the organizing model.
- Participates constructively in strategy discussions.
- Understand and articulates campaign messages, goals, and obstacles.
- Assesses strength and weakness of the opposition.
- Consistently analyzes and tracks turf and prioritizes daily and weekly work.
- Suggests workable solutions for overcoming obstacles.
- Writes turf plan with clear goals and strategy.

While Frank understands the plan to win, and has a solid grasp on the campaign's big picture for victory, he still struggles with the smaller picture of strategically moving his turf—how to plug people into different roles to move the turf forward, whom to target, etc. He relies too heavily on his lead for finding tasks and plans of action. He should figure out goals for his turf (weekly and monthly), then strategize ways of meeting those goals — figuring out who he can utilize (specifically identifying workers and coworkers) to meet those goals. Overall this is an area of weakness for Frank. He should focus on this as this is a critical component of successful organizing.

Good Work Habits

- Punctual and willing to work extended hours.
- Uses union resources wisely.
- Prioritizes activity and uses time effectively.
- Takes direction and feedback well.
- Creates and uses work plans.
- Handles administrative responsibilities.
- Takes responsibility for work and actions.
- Positive member of the team.
- Represents AFSCME in a professional manner.

Frank is a positive addition to the team, and relates well with his coworkers. He does not always show up for morning debrief on time, however. While it's not a pattern of tardiness, he needs to make time management more of a priority in his work going forward—both for the sake of his coworkers and the workers he's organizing.

Throughout your year, experienced organizers will ride-along with you monthly to demonstrate best practices, observe your skills, and give you detailed, specific written feedback on your work. They will fill out and review the Ride-Along form with you. Take advantage of this time with an experienced organizer!

Ride-Along Form

Organizer: _____

Trainer: _____

Date: _____

Campaign: _____

Campaign Activity: _____

Hours: _____

Number of completed 1:1s: _____

What were the organizer's goals and plan for the day? Could the organizer articulate how it would move the turf/campaign forward, and how it fit into his/her weekly plan? What is his/her self-assessment of strengths and weaknesses at the beginning of the day?

Use specific examples to identify strengths and weaknesses in each area listed below.

Preparation: Was the organizer prepared for the activity of the day? What had the organizer done in advance to make sure activity would be successful? (For example, if applicable, was there a turnout plan and what was it, did organizer involve current members, etc.)

Assess overall confidence in relating to workers, relational skills and ability to engage worker(s), as well as ability to direct and move the conversation:

Step 1: Effective introduction (For site visits, was there a compelling, urgent, on-message intro rap?).

Step 2: Getting the worker(s) to interact and be part of the conversation, and uncovering issues and motivation.

Step 3: Communicating the knowledge and vision of the union, using campaign message and plan.

Step 4: Agitating around motivation.

Step 5: Moving workers to commit, and follow up plans.

Did organizer get the most out of the home visit/site visit/one-on-one, or were there missed opportunities?

What specific feedback did you give, and did you see it incorporated?

Ask an experienced organizer, your lead or your director to observe you run a meeting. Use the form below to prepare for the debrief.

Feedback Form

for Planning & Running Meetings & Actions

Organizer: _____

Trainer: _____

Date: _____

Campaign: _____

Campaign Activity: _____

What were the organizer's stated goals and plan for the meeting or action, and were they clearly defined? Could the organizer articulate how the activity would move the turf/campaign forward, and how it fit into his/her turf plan?

What is his/her self-assessment of strengths and weaknesses at the beginning of the day?

Use specific examples to identify strengths and weaknesses in each area listed below.

Turnout & outreach plan

Did organizer meet turnout goals? Why or why not?

Were worker leaders involved in the preparation of/for meeting/action?

During the meeting/action:

Assess overall confidence and rapport with workers, and ability to guide the meeting/action:

Did the organizer have an agenda that accomplished the goals, and was it followed?

Was the goal of the meeting/action clearly communicated to the participants?

Give examples where organizer demonstrated leadership during the meeting/action:

Communicated the vision of the union, using campaign plan and message:

Was there a training component to the meeting/action, and was it effectively facilitated?

Follow-up plans and assignments. Did workers leave activity motivated and ready to act?

Did organizer get the most out of the meeting/action, or were there missed opportunities?

Was debrief of meeting/action and self-analysis accurate? What specific feedback did you give?

Priority issues for organizer to work on in the future:



for Preparing for Your **EVALUATION**

These are the areas of your performance you will be evaluated on during the course of your OIT period. Please take some time before your evaluation with your supervisor to fill this out about yourself and reflect upon the areas of your development you need to focus on.

Housecall Skills:

- (How do you think you do at listening, following the agenda, securing commitments, the rap, ability to complete the work; what are your strengths and what are your weaknesses?)

Servicing/Running & Contributing to Meetings:

- (How do you do at following: turnout, the agenda, speaking ability, motivational ability? What are your strengths and what are your weaknesses? What do you want to work on in the coming months?)

Leadership Development:

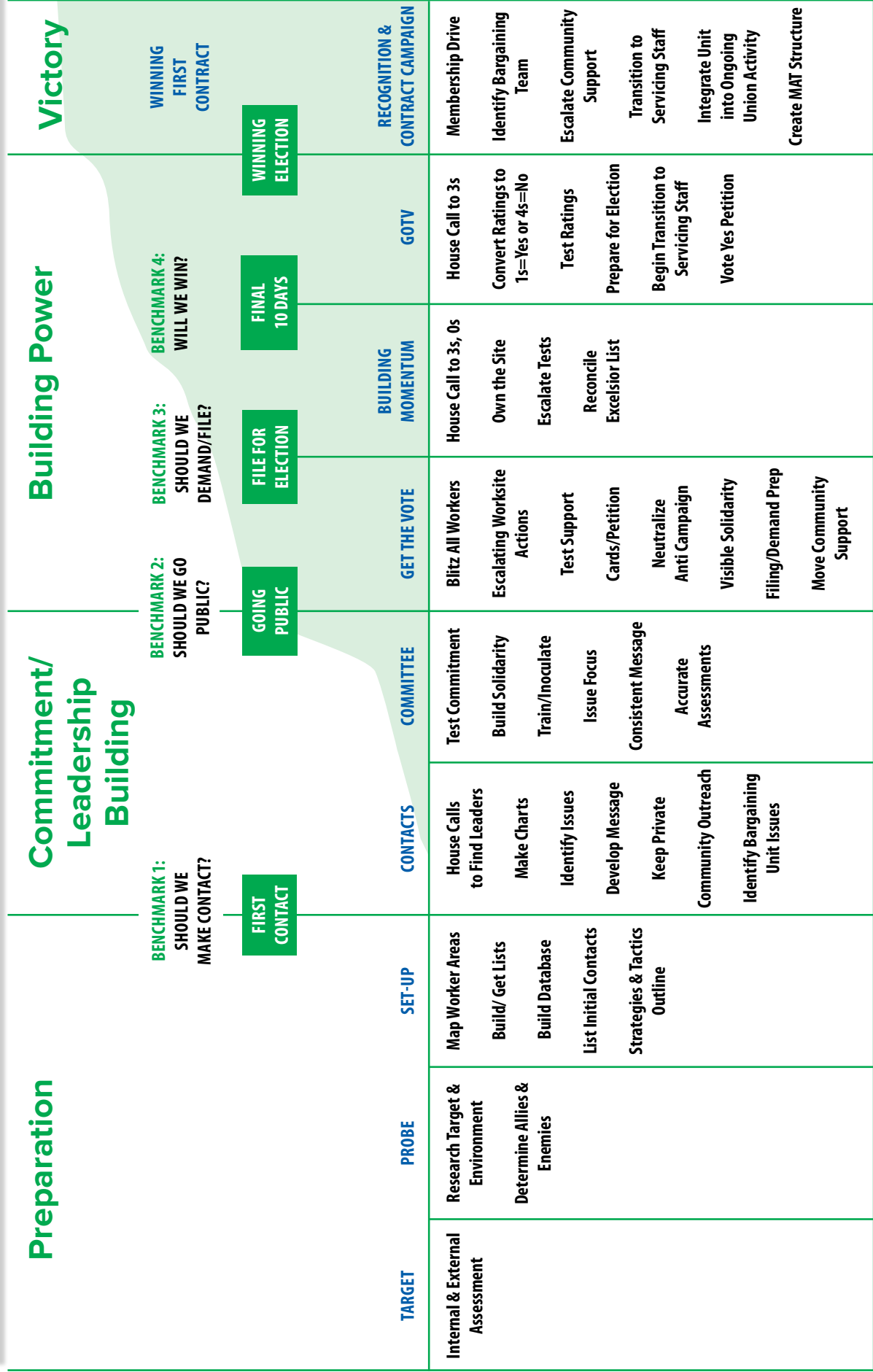
- (How do you do at identifying leaders, getting commitments, turnout, assignments and training; what are your strengths and what are your weaknesses? What do you want to work on in the coming months?)

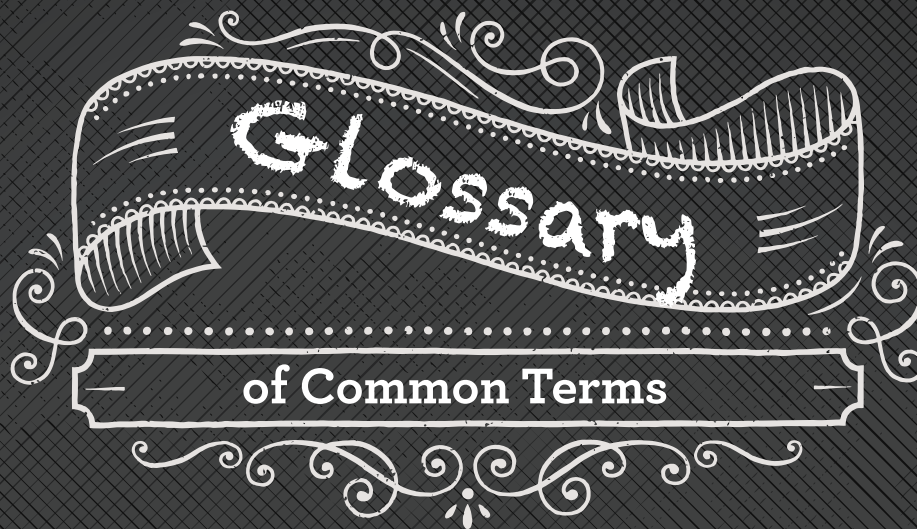
Campaign Planning & Strategic Decision Making:

- (How conscientious are you at writing and implementing personal organizing plans, working with others to develop and implement their plans, making good strategic decisions and winning campaigns? What are your strengths and what are your weaknesses? What do you want to work on in the coming months?)

Dedication to Work, Attitude & Results:

Organizing Model





Glossary

of Common Terms

Accretions: Workers with job classifications that are added to the bargaining unit after a union is certified as a representative of the bargaining unit.

ADA: Americans with Disabilities Act. This is a law that covers workers who have disabilities from discrimination in hiring and allows for reasonable accommodation by the employer to aid in the employee's ability to perform his or her job.

Administrative Law Judge: is appointed by the National Labor Relations Board (NLRB) to conduct unfair labor practice hearings in the region where such cases originate.

Affiliates: The term affiliate is used to describe council and local unions which are “affiliated” to the national union.

AFSD: Area Field Services Director. An AFSD is assigned a specific geographic area within a region to work with our union leadership as a resource. An AFSD reports directly to the regional director of that region.

AOD: Area Organizing Director. Assigned to work large organizing drives to manage national staff, coordinate the resources and assess the needs of organizing projects assigned through the Organizing department. An AOD works with the regional leadership during a specific organizing project and reports directly to the national organizing director.

ARD: Assistant Regional Director. An ARD assists the regional director in the day to day operations of the region.

Arbitration: Is a process of settling a labor-management dispute by having a neutral third party resolve the issue. The decision of the third party (arbitrator) is usually binding. Note: Advisory arbitration is a form of arbitration where the arbitrator's ruling is an opinion of the issue and is not binding to either party.

Attrition: Reduction in the labor force through conditions such as voluntary quits, retirement, as opposed to layoffs.

Authorization Cards: A card authorizing the union as collective bargaining representative signed by pro-union workers during an organizing campaign. Membership cards should be used instead of authorization cards on organizing campaigns.

Award: The final decision of an arbitrator, which is binding on both parties.

Bargaining Agent (BA): Union designated by a government agency or recognized voluntarily by the employer, as the exclusive representative of all employees in the bargaining unit for purposes of collective bargaining.

Bargaining Rights: These rights are outlined by law, ordinance or in some circumstances by executive order for public employees because they are excluded from the National Labor Relations Act. Private sector employees have rights outlined in Section 7 of the National Labor Relations Act. These are rights of workers to negotiate the terms and conditions of employment through chosen representatives.

Bargaining Unit: Is a group of workers who bargain collectively with the employer. The unit may include all the workers in a single location or in a number of locations, or it may include only the workers in a single craft or department. Final unit is determined by the appropriate labor authority, or agreed to jointly by the union and the employer.

Captive Audience Meeting: A union term for meetings of workers called by management and held on company time and property. Usually the purpose of these meetings is to try to persuade workers to vote against union representation.

Card Check: In rare instances, signed authorization cards are checked against a list of employees in a prospective bargaining unit to determine if the union has majority status. The employer may recognize the union on the basis of the majority status on cards without the necessity of a formal election.

Cease & Desist Order: An order to stop an action, to not repeat the action, and to take action to undo the wrong. A cease and desist order issued by the NLRB is a final order in an unfair labor practice case. It requires the guilty party to stop any conduct found to be in violation of the law.

Certification: Official designation by a labor board of a labor organization entitled to bargain as an exclusive representative of employees in a certain unit.

Certification Bar: The NLRB and many public sector agencies will prohibit another election in a bargaining unit for one year after a union has been certified following an election.

Certified Union: It is the official status designated by federal or state labor relations boards to a recognized union as the exclusive bargaining agent of a group of workers.

Charge: Written statement of alleged unfair practices or violations of the rules of an official process by a labor authority.

Check-Off: A contract clause authorizing the employer to deduct union dues from paychecks of those members who so authorize deductions. The employer then transfers the money to the union.

Closed Shop: An agreement between an employer and a union that, as a condition of employment, all employees must belong to the union before being hired. The employer agrees to retain only those employees who belong to a union. The closed shop was declared illegal by the Taft-Hartley Act.

Collective Bargaining: A process in which workers, through their bargaining committee, negotiate as a group to determine wages, hours and other conditions of employment.

Common Law: The law of a country or state based on custom, usage and/or the decisions and opinions of a court.

Complaint: Official document issued by the NLRB to start an unfair labor practice hearing before an administrative law judge. The complaint states the basis for the board's jurisdiction and the alleged unfair labor practice.

Community of Interest: Principle used in labor law to define bargaining units. Physical location, joint administration and similar job duties are examples of communities of interest.

Concerted Activity: The right for private sector employees that is protected by the National Labor Relations Act, of two or more employees to act in concert to form, join, or assist labor organizations in order to affect their wages, hours or work or working conditions. Public sector rights to organize vary by labor authority for each public employer.

Decertification: Withdrawal—by an official labor authority—the certification of a union if a majority of employees vote against union representative in a decertification election.

Deferral: For private sector employees it is a policy of the NLRB not to process unfair labor practice charges if the charge can be filed as a grievance and taken up through a grievance and arbitration procedure.

DOL: Department of Labor.

Duty of Fair Representation (DFR): A union's obligation to represent all people in the bargaining unit as fairly and equally as possible. The union is obligated to give fair representation to all union members, and also to collective bargaining unit members who have not joined the union in "right-to-work" states or in public service units.

Equal Opportunities Employment Commission (EEOC): Federal government agency that administers most discrimination lawsuits and often covers both public and private sector employees.

Excelsior List: Established in the NLRB case of "Excelsior Underwear," the list of names and addresses of employees eligible to vote in a union election. Public sector employees obtain information through the designated labor authority and the laws vary as to the inclusion of home addresses.

Exclusive Bargaining Agent: The right of a union that has been certified by the NLRB or other government agency to be the only union representing a particular bargaining unit.

Fair Labor Standards Act (FLSA): It is a 1938 federal law that established a minimum wage, maximum weekly hours and overtime pay requirements.

Fair Share: Negotiated in a union security clause of a union contract. It is the amount a non-union member must contribute to a union to support collective bargaining activities. This arrangement is justified on the grounds that the union is obliged to represent all employees faithfully.

Field Coordinator (FC): An FC may be assigned to organizing campaigns or field service projects as needed. Also manages the work of field staff and small projects as assigned.

International Union Representative: In addition to organizing, IURs assist affiliates with training, contracts and grievances.

Jurisdictional Dispute: A conflict involving a dispute between two unions over which shall represent a group of employees in collective bargaining.

Laboratory Conditions: Term for the most fair conditions that could exist in a union recognition process.

L-M Reports: The annual financial statement of income and expenses, including the salaries of union officers and staff. Unions are required by law to file with U.S. Department of Labor.

Member Action Team (MAT): Training for members or workers organizing a union that creates a communication/action network within the workplace.

Membership Cards: A card authorizing the union as their collective bargaining agent and authorizing dues deduction — often after the first contract is ratified. Membership cards should be used in place of authorization cards during organizing campaigns.

Meet & Confer: A process of coming to an agreement that in most cases is not binding to either party. This process is considered a path to stronger negotiations and bargaining laws over time.

National Labor Relations Act (NLRA): Federal law guaranteeing workers the right to participate in unions without management reprisals.

National Labor Relations Board (NLRB): Is an agency created by the National Labor Relations Act, to facilitate the National Labor Relations Act.

National Mediation Board (NMB): Established under the Railway Labor Act, the NMB conducts representation elections, regulates major disputes, and appoints arbitrators and boards to decide minor disputes in the railway and airline industry.

Organizing Committee (OC): Workers who give their own time and passion to organize their union alongside staff and other member volunteers.

Open Shop: Where employees do not have to belong to the union or pay dues to secure or retain benefits even though there may be a collective bargaining agreement.

Past Practice: A customary way of doing things not written into the collective bargaining agreement.

Public Employee Labor Relations Act (PELRA): A law legally granting public employees the right to collective bargaining or negotiate an agreement.

Public Employee Relations Board (PERB): A labor authority that enforces a legal action granting public employees the right to collective bargaining or negotiate an agreement.

Rank & File: The members of our union.

Ratification: Formal approval of a newly negotiated agreement by vote of the union members affected.

Recognition: Employer acceptance of a union as the exclusive bargaining representative.

Recognition Picketing: Picketing to pressure an employer to recognize a union as a bargaining agent for the employees. Recognition picketing is subject to certain restrictions under the amendments to the NLRA.

Regional Director (RD): RD manages and coordinates the resources of our union to the union leadership in their geographic area. Regional directors work in conjunction with national department leaders and the national leadership.

Regional Field Administrators: RFAs in each regional office prepare the campaign budgets, process and approve travel and advance authorizations (TAs), expense reports, leave requests and arrange travel for OIAs and VMOs.

“Right-to-Work” States: States that have passed laws prohibiting unions from negotiating union shop clauses in their contracts with employers.

Subcontracting: (Contracting Out/Outsourcing) An employer’s practice of having work performed by an outside contractor and not by regular employees in the unit.

Taft-Hartley Act or Labor Management Relations Act (LMRA): An amendment of the NLRA that added provisions allowing unions to be prosecuted and sued for a variety of activities, such as mass picketing and secondary boycotts, and authorized states to enact "Right to Work."

Travel & Advance Authorization Forms (TAs): A form used to track and approve all travel requests (including flights, rental cars, advances and hotels) incurred by the union. TAs must be submitted and approved prior to travel.

Unfair Labor Practices: Those employer or union activities classified as “unfair” by federal or state labor relations acts.

Volunteer Member Organizer (VMO): Member who gives their own time and experience as a member of AFSCME to help build our union.

Weingarten Rights: The rights of employees covered by the NLRA to request union representation during investigatory interviews if they reasonably believe that the interview could result in discipline. Weingarten rights also guarantee the rights of union representatives to assist and counsel employees during interviews that could lead to discipline.





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