



## Best Practices for Teamster Business Agents and Representatives



Training and Development Department  
International Brotherhood of Teamsters

# Best Practices: Introduction

## This Best Practices Manual:

- √ Is a quick reference guide for Teamster business representatives or agents.
- √ Will help new agents get started in their positions.
- √ Is a good review for experienced agents, especially when dealing with a difficult situation or problem.
- √ Is based on the combined experience and knowledge of many experienced union representatives.
- √ Doesn't have all the answers, but tries to cover the most important things a representative needs to know and to help you avoid making mistakes.
- √ Acknowledges that the best way to learn is to do the job with the back-up and support of an experienced agent, gradually taking on more responsibility as you learn.

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# Best Practices: Approaching the Job

## What is the job of the union representative?

The Teamster Business Agent's job includes many roles such as negotiator, grievance handler, organizer, trainer, mediator, and counselor, to name just a few. Where do you start in learning how to handle each of these roles?

Knowing the union's fundamental mission and purpose, as outlined in the IBT Constitution, *to serve, organize and educate members*, is key to being a successful business representative and a perfect place to start the learning process.

One of the most important activities to support our mission and purpose is to identify, recruit, train and develop stewards and active members who will get involved in building the union, solving workplace problems and working along with you to get their needs met. It is your job as a Teamster agent to motivate, support, encourage, organize and lead those stewards and active members.

It is often tempting to try to solve all the members problems yourself, especially since members often have the attitude that paying dues entitles them to have you take care of all their work problems for them. Don't fall into that trap. It will put enormous pressure on you and it doesn't build the union.

Another trap to avoid is getting so caught up in the day-to-day tasks of the job (grievances, meetings, phone calls, etc.) that the union building functions of setting up steward systems, member-to-member networks, and campaigns for new contracts or other issues are forgotten.

It is important to understand that goals need to be attained from the perspective of the local union as well as from your work objectives.

## Here are some tips on how to do your job in a way that builds the union:

**1. Have a plan** for the workplaces you represent (shops, barns, offices, etc.) What would it take to make those areas stronger union worksites? Do you need better stewards? What issues do the members care about? What needs to be done to improve the contract? How are the lines of communication between the members and the local union? Work with the stewards and active members to make plans to address those needs.

**2. Build a structure** of stewards and active members to work with you. This

requires learning how to spot potential stewards and encouraging, training and supporting them to do a good job. You are responsible for seeing that there are enough stewards in the right places and taking the appropriate action when a steward isn't doing his or her job properly. It also means working with committees of members who will help organize, engage in political action, support negotiations, plan social and community activities, etc.

**3. See that things get done, but don't do everything yourself.**

Delegate, bring people together, clarify issues, provide information, identify options, plan strategies, define tasks and keep everyone on track and doing their assignments.

**4. Show members how they can help themselves.**

Don't do things for members that they can do for themselves. Educating members is part of the fundamental mission of the Union. This means giving them a phone number of someone to call, referring them to a steward who can help them, telling them about a meeting or rally called to address their issue, etc.

**5. Train stewards and active members to handle as much as possible.**

This can be done by holding classes, having them observe you in action and then debriefing what you did, letting them run a meeting with you there as backup, coaching them before they meet with management, etc.

**6. Explain to members how the union works and what it takes to win.**

Instead of telling a member, "you have a good case (or a bad case)," explain the factors that will affect the outcome of the case. In preparation for bargaining, identify what it will take to get a good contract and what they can do to help.

**7. Look for ways to make union activities attractive.**

This includes simple things like providing refreshments, keeping meetings short and to the point and thanking people. It also includes more complicated things like identifying issues the members care about and planning actions and tactics to address those issues that are creative so people enjoy doing them. Teamster members have many talents so ask for their input and encourage their participation.

## **Tips from the Veterans**

✓ **Visit stewards and members before meeting with management.**

Avoid even the appearance that you are "cozy" with management. When you enter a worksite talk to the stewards and members first. When you meet with management take stewards with you or at a minimum brief the steward before and after the meeting with management.

✓ **Clarify who has the authority to make decisions and who must be consulted.**

You can avoid a lot of confusion and stress if you clarify in advance who has the final say on decisions that have to be made to carry out your job duties - you, a local union officer, a stewards' council, a member, other union reps, or some combination of people, etc. Even if you have the authority to make a decision, remember that people are more likely to support that decision if they are consulted first.

✓ **Solve problems--don't blame.**

When something goes wrong don't waste time blaming yourself or others. Figure out how and why it happened. Decide what, if anything, you can do to fix it or make it better. Make any changes necessary for the future and learn from the experience.

Try to turn your problems and errors into something good. For example, a group of members complain they never see you. Don't dwell on whether you did or did not visit them enough. Instead say, "O.K., I'm here now, let's talk about your issues and problems and figure out what WE can do about them."

✓ **Don't blame members for apathy -- look for ways to change it.**

To get members active in the union, it helps to determine their reasons for not getting involved. There might be child care or other family responsibilities that limit the time they have available. Perhaps you are asking them to do something on an issue they don't care about. Are the meetings that you want them to attend long and boring? Try to find out why members don't get involved and use that information to try again.

✓ **Take care of yourself before you burn out.**

Not every veteran is good at following this advice, but they all agree that you have to take time for yourself, have outside interests, and practice healthy habits (healthy diet, no smoking, exercise, etc.) Many Teamsters are workaholics and, unfortunately, end up with health issues that could have been avoided.

✓ **Get help and advice.**

No one has all the answers and not everything is spelled out in black and white. Find experienced business agents and others you can observe in action and/or go to for information and advice.

# Best Practices: Organizing Your Work

**Utilize systems to keep track of all the things you do as a Teamster Rep.:**

**Charts, database, maps and/or lists of all your worksites** with the names of your stewards and members. The first thing you should do as a new Teamster Rep is to make a list of every worksite for which you are responsible. Each worksite list should identify the stewards (and possibly active members), their contact information and their preferred method of communication. If possible, attach a list of all of the members' names at that worksite. If you don't have this information, visit the site to meet or recruit stewards, if needed, then have the stewards help you get the list of members' names and their contact information.

At the end of this section are checklists called, Analyze Your Area, which should be helpful in charting your area.

**A tracking system that lists all the grievances** for which you are responsible and warns you of time limits. Your local may already have a system for tracking grievances and alerting you to time limits. Whether there is a local-wide system or not, you need to make sure you **stay on top of your** grievances and meet all time limits. Your system can be as simple as a written list or chart that you look at regularly. Some agents write the name of a grievance on a calendar on the day before the time limit expires as a reminder.

**A notification system for contract negotiations** that lets you know when it is time to send reopener letters and to start other preparations for bargaining. Many local unions have systems in place to automatically send re-opener letters at the appropriate time. Even if you have such a system in your local, it is wise to have your own system to remind you when to start the other preparations for bargaining such as surveys, selecting a committee, meetings with the membership, writing proposals, etc.

**A record of your visits to worksites.** This can be a simple database, chart, calendar, or diary where you note the date, time, length of visit, who you saw and what you did. This information will help insure that you don't visit the same places often while neglecting other sites. It will help you remember names and issues for future visits and give an overview of what is happening in your areas. It also may come in handy if members complain that they never see you.

**A phone call log.** This is similar to the record of visits, but for incoming and outgoing phone calls. The record should include who was on the call, the times the call started and ended and a few words about the content of the call.

### **A system for keeping frequently called phone numbers.**

Keeping frequently called numbers in one handy place will save time and stress. Every time you look up a phone number that is not in your system, add it to your file so you don't have to search for it the next time. Make sure that wherever you save contact information, you also have a digital or hard copy backup.

**A to-do list.** It is impossible to remember everything you need to do in your head. You have to write down the tasks you need to get done. Some reps use a master to-do list with everything they have to get done, and then use it to develop a daily to-do list each morning or evening for the next day.

## **Tips from the Veterans**

- ✓ **Develop stewards councils.** Councils bring stewards together to help each other solve problems, compare notes, etc. Set up a regular meeting time and provide the space, refreshments or other resources they may need. This saves you time and helps develop better stewards.
- ✓ **Set up a member-to-member system in each worksite.** The member-to-member system ensures that every member can be contacted within a short period of time. Since you can't do that by yourself, it's important to set up the system before it's needed. This means that stewards and active members each have a list of members they are asked to contact when you call them with fast-breaking information. Contacting members at work can be supplemented with a phone tree, where volunteers each take a certain number of members to call on the phone.
- ✓ **Do not assume that if you don't hear from an area, everything is OK.** Find out what's going on at that worksite--you may head off a crisis. It is important to keep a finger on the pulse and know how things are going in each respective worksite.
- ✓ **Work with your office staff effectively.** Let them know how you like your work done; give them enough information, support, feedback and encouragement to do it efficiently.
- ✓ **Keep form letters, meeting notices, etc., on hand or in your computer.** This way you don't have to write from scratch each time. You can add in the appropriate information for each occasion.
- ✓ **Be friendly to the office staff and assistants of the people you call often.** Many times they can save you time by handling routine requests or advising you on the best time or way to make a request.

# Analyze Your Area

## 1. Support for the Union

### A shop is strong for the union if the members:

- ◆ turn out for union events
- ◆ go to their steward when there is a problem
- ◆ support each other when someone has a problem
- ◆ wear union buttons, T-shirts, hats, etc.
- ◆ help enforce the contract
- ◆ come to the union (not management) for reliable information
- ◆ refer to the union as "we" as in, "What are *we* going to do about this?"
- ◆ stewards in the same area communicate regularly

### A shop is somewhat supportive of the union if the members:

- ◆ sometimes come to union events
- ◆ go to the steward only with big problems
- ◆ support the union during bargaining
- ◆ sometimes believe management more than the union
- ◆ sometimes make separate deals with management
- ◆ refer to the union as "you" as in, "What are *you* going to do about this?"
- ◆ stewards sometimes talk to each other

### A shop is a weak area for the union if the members:

- ◆ never come to union events
- ◆ have no steward /don't know who the steward is/rarely go to the steward
- ◆ openly complain about the union when management can hear
- ◆ believe and support management more than the union
- ◆ often make side deals with management
- ◆ refer to the union negatively ("That #\*&@ union takes dues and does nothing.")
- ◆ stewards rarely talk to each other or help each other

## 2. Evaluation of Stewards and Other Leaders

**Are there enough stewards/leaders in the area? Do they reflect a cross section of the membership (age, job, sex, race, etc.)?**

### **Rate the steward/leader a "1" if he/she does all or most of the following:**

- ◆ everyone knows he/she is the steward
- ◆ communicates regularly with members about union activities and to discover issues
- ◆ welcomes new members and provides information about the union or sees that another member does it



- ◆ keeps union informed of important things happening in the shop
- ◆ gets the members to turn out for rallies and other union events
- ◆ attends meetings
- ◆ resolves many of the members' problems in the shop with management
- ◆ members trust him/her enough to come to her with problems and for advice
- ◆ is actively involved in stewards councils, if one exists
- ◆ has a list of members by area and shift with home and mobile phone numbers and email addresses

**Rate the steward/leader a "2" if he/she does all or most of the following:**

- ◆ people know he/she is active in the union
- ◆ keeps the members informed about major union activities
- ◆ calls the rep when there is a problem in the shop
- ◆ gathers and gives the rep reliable information on grievances and problems
- ◆ reluctant to deal directly with management
- ◆ attends the most important stewards councils, if one exists

**Rate the steward/leader a "3" if he/she does all or most of the following:**

- ◆ people may or may not know he/she is active in the union
- ◆ calls the rep with every little thing or doesn't call when there are problems
- ◆ is unwilling to deal directly with management on behalf of the union
- ◆ helps distribute some union information
- ◆ attends some stewards councils, if one exists

**Rate the steward/leader a "4" if he/she does all or most of the following:**

- ◆ no one knows he/she is active in the union OR everyone knows but he/she raises members' doubts about the union
- ◆ complains all the time about how "the members don't care"
- ◆ won't deal directly with management and the union OR can never resolve problems with management
- ◆ cuts deals with management
- ◆ takes management's side against the workers
- ◆ doesn't attend or plays a negative role in stewards councils, if one exists

### **3. Problems and Issues**

**Are the members upset or concerned about problems the union could be addressing? If you don't know, find out.**

**Is the union keeping the members informed and getting them involved in addressing and solving their problems?**

**Check to see if any of the following are happening in the workplace:**

- ◆ lots of discipline
- ◆ a supervisor everyone hates

- ◆ speed up of work
- ◆ safety hazards
- ◆ health hazards or inconveniences - heat/cold/smoking/odors, etc.
- ◆ layoffs
- ◆ up-coming negotiations
- ◆ certain parts of the contract consistently violated
- ◆ harassment of members
- ◆ new rules or regulations
- ◆ consistent paycheck problems
- ◆ favoritism, unfair administration of overtime, distribution of assignments, etc.

#### **4. Priorities**

**Set priorities by determining:**

**Which tasks will affect the most members and convince them that the union is taking care of business?** For example: group grievances vs. individual grievances, hot issues, negotiations.

**Which tasks will enable you to accomplish your other goals?** For example: recruit or train a steward, survey the members about their problems, get a committee started, organize a key non-union shop, etc.

**Which tasks will help solve problems at their source and prevent the problems from constantly reoccurring?** For example: pressure management to remove or straighten out a renegade supervisor so the union doesn't have a stream of discipline cases from that supervisor's area.

**Ask yourself what will happen if I don't do this now.** If the answer is nothing bad, then that is a lower priority task.

# Best Practices: Communicate to Build Unity

Teamster Business Agents need strong communication skills to motivate members individually and in groups, deal with management, resolve problems between members, run meetings, and in everything they do. It is important in your position that you are able to:

## **Listen.**

Listen more than you talk, don't interrupt, concentrate on what you are hearing instead of preparing what you will say next. Listen openly and objectively, not defensively. Sometimes there may be an underlying issue that is not being verbalized.

Consider more than one interpretation of what people do or say before forming an opinion, getting offended or deciding on a response. Don't assume that everyone views the world the way you do.

Paraphrase back what you heard to make sure you got the message correct. ("So what you're saying is.....is that right?")

## **Make clear statements, provide information, give directions.**

Present ideas simply and clearly in terms the listeners understand. Don't use jargon (arbitration, NMFA, ULP, etc.) or technical terms without explaining them unless you are sure your listeners know what they mean.

Use visual aids, like a powerpoint, flipchart or handouts, if these will enhance your message.

Watch body language of your audience for clues that they are confused or bored. If necessary, stop and ask or take questions to help get back on track.

Stop periodically to answer questions and get confirmation that you have been understood.

## **Persuade.**

Build trust with your members, stewards, management, and others with whom you work. It is easier to persuade someone if they like and trust you. Show members that you care about them, you hear their concerns, and follow through on commitments. Bluffing, playing loose with facts and similar antics will damage your credibility.

Members are more likely to volunteer to help the union if you ask them personally, give them details on the assignment, and offer back-up if they need it.

Sometimes you may not get what you ask for because you are either too aggressive or too passive. Requests that are too aggressive offend people and they resist because you make them angry. Passive statements leave people wondering what you want and don't motivate them to comply. When you make a request, be clear about the issue, how you feel about the issue and exactly what you want the other person to do.

## **Tips from the Veterans**

### **Communications in Diverse Groups**

- ✓ Don't lump together people from one group and assume they all act and think alike. Avoid both positive and negative stereotypes.
- ✓ Every person wants to be treated with respect, especially from their union. Sometimes people interpret things others say or do as showing disrespect when none is intended. Be alert to reactions you get when communicating, especially when you are communicating with someone who is different from you. Ask if you have offended the other person if you think you might have, get permission before getting too informal, don't stereotype, or judge members from preconceived ideas.
- ✓ Don't assume that people from an ethnic or racial group other than your own will follow the one or two leaders you find or designate. Consult with a variety of people from the group.
- ✓ Don't conclude that because a group of people is not involved in the union it's some innate or cultural reason that you cannot do anything about. Find out the reason(s).
- ✓ Don't ignore interpersonal or intergroup friction or problems. Ask for help from experienced people from various ethnic/racial/gender groups to resolve the issues.
- ✓ Don't ever use the expression, "you people." Remember to always say, "we" as in "we need to resolve this problem" or "we will win if we stick together."
- ✓ Ask the members for their ideas on how to include everyone in the union.

# Guide to Running Better Meetings

## **Planning the meeting:**

- ◆ What is the goal or purpose of the meeting?
- ◆ Is a meeting the best way to accomplish this task?
- ◆ Who needs to be at the meeting? How will we get them there? Is a written notice needed? How else will we build turn-out?
- ◆ What information and materials will we need?
- ◆ Develop an agenda.
- ◆ Logistics: getting a room, picking the best time, seating arrangements refreshments, etc.
- ◆ Assignments: chairperson, recorder, timekeeper, sign-in sheet, greeters, etc.
- ◆ Prepare those who will be giving reports.

## **Setting the tone:**

- ◆ Distribute or post the agenda and review it.
- ◆ State reason for the meeting and what will happen at the meeting such as make a decision, get to know each other, list ideas for future action, give opinions, get questions answered, listen to information, etc.
- ◆ Establish ground rules such as smoking, how to participate, length of meeting, authority of the chair, unacceptable behavior or language, etc.

## **Getting people involved:**

- ◆ Name tags and warm-ups to break the ice. (e.g.: ask each person to give their name, where they work, and how long they have been in the union)
- ◆ Talk to people before meeting starts.
- ◆ Make sure they know how to participate (raise hand, or just speak out, etc.)
- ◆ Call on people by name.
- ◆ Go around the room.
- ◆ Ask for people to speak who haven't yet spoken.
- ◆ Don't unconsciously discourage participation.

## **Summarizing and giving assignments**

- ◆ Summarize so everyone leaves knowing what was accomplished.
- ◆ Make sure everyone knows their assignment (if any) and to whom they should report.
- ◆ Chair or someone else should record the list of assignments for follow up.

# Best Practices: Organizing

Whether you are organizing a new unit of unorganized workers, signing up members in an open shop, trying to get members to support negotiations or take action over an issue, the principles of organizing are the same. They include:

## **1. Groups follow good leaders.**

To move a group, you need to find respected, courageous leaders who are representative of the group. Make sure all shifts, job classifications, racial and ethnic groups, women and men, etc., are represented in the leadership of the effort.

Workers will listen more readily to a co-worker than to someone from the outside they don't know and are unsure whether or not to trust. Provide the strong union supporters with the tools to organize the other workers

## **2. People organize over issues.**

You have to listen to workers to find out what they care about. What would they change about their jobs, what do they find unfair, what really "bugs" them, etc. Then show them how through organizing they can make some of the changes they want.

## **3. Face to face communication is the most powerful form of communication.**

Organizing campaigns are won, and individuals and groups are persuaded to take action because someone spoke to them face to face and convinced them. You need to train the leaders from the group how to talk to their co-workers. Practice with them how to present the union's position, listen and answer questions.

## **4. Make sure everyone is contacted.**

Set up a one-on-one (member-to-member) system to make sure every worker is contacted. Then assign a certain number of co-workers (i.e., five or ten) to each leader. This way no one will feel overwhelmed and all the workers will be contacted.

## **5. Use a system to evaluate the level of support.**

Every organizing effort needs a way to determine the level of support for what the union wants the workers to do. For instance, 1=very strong support, 2=leaning towards the union, 3=leaning away from the union, and 4=hostile to the union. Once you have identified the strong supporters (the #1's) work with them to talk to the people in the middle (#2's and #3's). Don't waste time arguing with or trying to persuade the #4's.

You determine how to rate each worker, by having the leaders of the group talk to each worker and by giving the workers, "tests" such as, will they wear a union button at work, will they sign a petition, did they attend a union rally, etc.

**6. Use tactics and communications that build on the culture of the group.**

Do they like to get bulletins or verbal updates? Will they like a cartoon that makes fun of the boss or a serious handout that explains the boss's unfair action? Do they get together after work for a beer or go somewhere for lunch together? Are there clubs/teams/ethnic group functions you can tap into for support and commitment?

**7. Workers get involved one step at a time.**

Start by asking them to do something simple like sign a petition or gather some information. If they do that and are ready for more, you can consider asking them to take bigger steps like joining a protest action or taking responsibility to talk to a number of their coworkers.

**8. Build on victories**

To keep workers motivated during any group activity, look for issues that you can win. These might be smaller issues but ones workers care about, like the condition of the rest rooms or the way the boss talks to people. Celebrate each victory and build on them. Once workers see they have the power to win, they will be more willing to get involved.

## Tips from the Veterans

### Organizing in general:

- ✓ In motivating others it helps to remember why/how you got involved in the union.
- ✓ Whenever you want to get a group to do something start with the people most interested and work out from them. Don't spend all your time talking to people already on your side or arguing with the people most opposed.
- ✓ If you ask a worker to do something, always follow up to see if he/she does the assignment. Otherwise, people will soon realize that it doesn't matter to you whether they do what you ask of them.

### Organizing new units:

- ✓ Not every organizing lead is a good one. To win a long hard organizing campaign you need strong leaders from the unit, issues of fair treatment and respect, and a reasonable expectation that the union can win a

contract.

- ✓ Don't start campaigns by showing up with cards and leaflets at the employer's gates. This just gives the boss a chance to beat the union before you can to build a committee of supporters.
- ✓ Don't petition for representation of a new unit without a strong majority signed up. Don't believe, "they won't sign a card, but they will vote for the union."
- ✓ Don't make promises to unorganized workers about how much the union will get them.
- ✓ Don't assume that because someone signed a card, they will definitely vote for the union. Look for other signs of support such as wearing a union button, what they say to others, attendance at union events, etc.



# Best Practices: Problem Solving

Part of the business agent's job is to find ways to solve members' problems on the job. There are various ways to solve those problems and each has advantages and disadvantages. It is your job to decide which methods to apply in each situation, keeping in mind not only how to solve the problem, but how to use the problem as an opportunity to build the union.

- ◆ **No one problem-solving method is best for every situation.**
- ◆ **In choosing a problem-solving method, consider the advantages and disadvantages of all your options.**
- ◆ **Always consider how the method you choose helps build the union.**  
Can you win? Will it teach members skills? Does it get them involved? Does it show them something about the boss or their own power?
- ◆ **Involve the members in choosing the method** - you will get better ideas and decisions plus they will more enthusiastically participate.
- ◆ **Often, several problem-solving methods can be used in combination, or one after the other.**

## Tips from the Veterans

- ✓ The perception of power is as powerful as actually having it. An employer sees the union as having power when groups of workers stand together in protest of an unfair action or ruling. Whether it's having everyone wear the same color shirt or a union button, hat or jacket on a designated day, management sees support for the union within the work place.
- ✓ Be creative and unpredictable; keep management guessing about what you will do next and make the actions fun for the workers. Find workers who have special talents such as singing, drawing, playing an instrument, etc., and build them into actions.

- ✓ Even when you are confronting management keep a line of communication open so you can negotiate a settlement.
- ✓ To come up with creative ideas think hard about all the options, list them, work to expand them, then put them aside. Focus your mind on other things. Read magazines you don't usually read, listen to music, look at art etc., then come back to the problem and see if you get any other ideas. Include others in this process. Bounce ideas off of people NOT involved as well as those who are involved.

# Best Practices: Grievances & Arbitration

## **Use the grievance procedure to build the union.**

This is done by keeping members informed of the progress of grievances, filing group grievances where possible, organizing support activities for important grievances that effect a lot of members, explaining to members how the grievance process works, inviting members to observe grievance hearings, etc.

## **Keep stewards, grievants and effected members informed.**

It is important to update members on progress and lack of progress. Even if there is nothing to report, members want to hear that their case hasn't been forgotten. Whenever possible tell members the reasons for delay or for other developments and what if anything they can do to help move the case along.

## **Explain to stewards/members what it would take to win the case and why.**

Show members the contract and bargaining notes of its intent, past arbitrators' decisions of similar cases under your contract, and the [BNA Grievance Guide](#) (available on [www.bna.com](http://www.bna.com)) which lists the standards arbitrators use to decide different types of cases.

## **Handle all grievances on their merits and treat all grievants equally.**

Under the National Labor Relations Act and most public employee laws, the union has a Duty of Fair Representation. This means all similar cases must be treated equally regardless of who files it. All cases should be investigated adequately before a decision is made on whether to proceed. The grievant's support (or lack of) for the union, you, or officers of the local cannot be a factor in how you handle the case.

## **Confirm all agreements/settlements/decisions in writing.**

This includes agreements between union and management as well as agreements between the union and grievant.

## **Watch time limits--get extensions of time limits in writing.**

## **Create a paper trail.**

Put in writing everything you did for the case in the event management breaks their word, to help someone else pick up the case if you had to stop handling it, and in the event the grievant is unhappy or files a duty of fair representation case. The most common way to create a paper trail is to send a letter to management or the grievant saying, "This shall confirm that we agreed to the following...." End the letter by saying, "If I do not hear from you, I will assume that the agreement as I have stated it in this letter is acceptable to you."

## Tips from the Veterans

- ✓ Get and use a copy of the latest edition of the BNA Grievance Guide. It gives the guidelines arbitrators use to decide cases. It is divided by the type of case (absenteeism, drugs and alcohol, overtime, etc.). If you are involved in arbitrations, get a copy of How Arbitration Works. Both books are available through some book stores or from the publisher, Bureau of National Affairs ([www.bna.com](http://www.bna.com)).
- ✓ Locate the bargaining notes for the contracts with which you work. You may need to check those notes to establish the intent of a section of the contract.
- ✓ Evaluate how management is using the grievance procedure. Are they respecting the procedure and trying to make it work, or using it to delay solutions, frustrate the members and cost the union money? Respond appropriately.
- ✓ A good, early investigation is key to good grievance processing.
- ✓ Keep a good complete grievance case file that anyone can pick up and run with.

### Tips on settling grievances:

- ✓ Focus on what will satisfy the grievant and the union rather than on "winning or losing."
- ✓ Separate all the various issues involved in the grievance and address them individually--look for compromises and/or solutions.
- ✓ Adjust your presentation style to the situation and the type of person you are dealing with from management. Sometimes you should come on strong, other times lay back and listen. Some managers respond better if you start off with some pleasant small talk, while with others it's better to get right down to business. Whichever style you use, it should be something with which you, the grievant, and steward are comfortable.
- ✓ Determine management's reasons and needs behind their positions--this will give you clues to possible settlements.
- ✓ You can sometimes settle a tough case if you do it without setting a precedent.

- ✓ When management has enough proof to make discipline stick, sometimes you can get a member another chance if he/she convinces management he/she made a mistake and is sorry.
- ✓ Management will sometimes agree to seal negative information in a grievant's file and destroy it in the future after a period of good performance.
- ✓ Point out to management why they should settle the case (it will go to the next step and expose them to higher management, they will lose at arbitration, the members will take some action, morale and production will improve if they settle, etc.)

# Best Practices: Bargaining

**How well you do in bargaining has more to do with how much power you have than how skilled a negotiator you are.**

**Bargaining takes place as much in the field as at the table.**

Management watches what the members do and say to help determine how to respond to the union's bargaining committee.

**Look for ways to increase the union's power.**

Build membership support, make alliances with community groups, enforce laws and government regulations, consider boycotts, be prepared to strike smart if necessary, plan strategic campaigns, etc.

**Management usually starts preparing for the next negotiations as soon as one contract is signed--the union needs to prepare early also.**

## Overview of the Art and Craft of Bargaining

**Maximize your strength and/or the appearance of it:**

- ◆ Show a unified team at all times
- ◆ Coordinate your pressure tactics in the field with your table strategy
- ◆ Use caucuses effectively--decide on rules for calling caucuses
- ◆ Decide in advance if, how and when sidebars will be used
- ◆ Never introduce or agree to a proposal unless it has been discussed in caucus
- ◆ Don't show unplanned emotion
- ◆ Have justification for your proposals
- ◆ Have committee members justify and support proposals
- ◆ Have a committee member from one area support proposals from another area
- ◆ Be careful about what tone is set by your bargaining ground rules
- ◆ Avoid an apologetic or defensive tone
- ◆ Deal quickly and firmly with verbal attacks from management
- ◆ Don't make idle threats-back up your table talk with actions in the field
- ◆ Bring members to the bargaining table to observe management's unreasonableness, to explain proposals and to show support.
- ◆ Build trust within your team

**Analyze management:**

- ◆ Know all you can about the management negotiators
- ◆ Evaluate management's seriousness by how well they justify their positions
- ◆ Ask questions and probe to learn more about management's positions
- ◆ Mentally put yourself in management's place to better understand their position
- ◆ Pretend you know less than you do to encourage management to tell you more

### **Technical skills:**

- ◆ Cost out proposals and use the information to make decisions
- ◆ Write good contract language--use tested language, if possible
- ◆ Take good notes on bargaining sessions
- ◆ Be aware of what is happening at the table at all times such as progress being made, stalling, who is on the defensive, who owes who a counter, etc., and take action to deal with the dynamics that aren't in your interest

### **Closing the deal:**

- ◆ Think ahead a few steps before making proposals
- ◆ Know what you want the final agreement to be
- ◆ Build momentum by starting with issues that can be resolved
- ◆ Accentuate the positive parts of your proposals
- ◆ Use bargaining jargon (e.g., is my proposal in the ballpark?) to explore possible compromises
- ◆ Skip tough issues and come back later
- ◆ Bring in a new face, if needed, to close the deal
- ◆ Employ more pressure tactics
- ◆ Allow management to save face
- ◆ Package several issues together with compromises by both sides
- ◆ Reward management, verbally, for making compromises
- ◆ Discuss possible compromises, "off the record" (no one takes notes)
- ◆ With the approval of the committee, have one or two negotiators from each side meet
- ◆ With caution, use a mediator

### **Don't leave anything on the table:**

- ◆ Keep good records of what has been agreed to and issues still open
- ◆ Make concessions sparingly - give something small, make it seem big and get something for it.
- ◆ Don't be put off by "no".

- ◆ Sometimes you can get more at the end in return for promising to recommend ratification, but don't make the promise if you don't intend to keep it
- ◆ Beware of:
  - bargaining environments that put you at a disadvantage (on the bosses "turf," isolation from membership, etc.)
  - management that only wants to talk about a limited agenda
  - management that uses the "good cop/bad cop" routine
  - your emotional needs (and management's) that might get in the way of an agreement
  - making decisions when you are tired and worn out.

## **Tips from the Veterans**

- ✓ Spend time early in negotiations getting to know your bargaining committee and winning their trust. You will need to have a good relationship to draw on when the tough decisions have to be made at the end of the process.
- ✓ Review what is happening in your negotiations with an experienced negotiator who can give you advice and help you make decisions.
- ✓ Build membership support for negotiations before you sit down at the table with management. For larger units have someone who is not at the bargaining table help you inform and mobilize the members.
- ✓ Months ahead of the start of bargaining, spend some time researching the employer. The IBT Economics and Contracts Department can be helpful in locating financial information on the employer, as well as in finding other Teamster contracts the employer has negotiated, or contracts with other unions.

**Best Practices: Self-Test**



**For each statement or question, mark your response using the following scale:**

- 1 = *never/strong disagree*
- 2 = *sometimes/disagree*
- 3 = *occasionally/neutral*
- 4 = *usually/agree*
- 5 = *always/strong agree*

## **Section A**

- \_\_\_\_\_ 1. I have a list/chart/map of all the worksites I represent
- \_\_\_\_\_ 2. For each location I have a list of the of members and stewards
- \_\_\_\_\_ 3. I know the strengths and weakness of each steward
- \_\_\_\_\_ 4. For each location I have at least one good steward
- \_\_\_\_\_ 5. I have a plan to help each steward learn more, take on as much responsibility as he or she can handle
- \_\_\_\_\_ 6. In each worksite I have or can quickly identify the issues and problems most important to the members who work there
- \_\_\_\_\_ 7. For each worksite I have analyzed the strength of the union and have a plan to improve it
- \_\_\_\_\_ 8. I have a system to make sure I do not miss grievance deadlines and contract renewals
- \_\_\_\_\_ 9. I have a good system for keeping track of *when* I visit worksites, *who* the key people are to see while there, and *what* the issues are
- \_\_\_\_\_ 10. I review my plans for my worksites/stewards regularly, discuss it with others and make adjustments as needed

## **Self-Test (continued)**

**For each statement or question, mark your response using the following scale:**

- 1 = *never/strong disagree*

- 2 = *sometimes/disagree*  
3 = *occasionally/neutral*  
4 = *usually/agree*  
5 = *always/strong agree*

## **Section B**

- \_\_\_\_ 11. I take time to think before responding to questions or challenges from members--including saying "I'll get back to you"
- \_\_\_\_ 12. Whenever I say "I'll get back to you", I do so promptly
- \_\_\_\_ 13. Whenever I enter a worksite, I visit the stewards and active members before seeing the boss
- \_\_\_\_ 14. I seek out information from members who don't speak up, or may not support me or the union all the way--I don't just listen to my friends
- \_\_\_\_ 15. When members question me or attack the union, I don't get defensive
- \_\_\_\_ 16. I explain to stewards and members why I am doing things and what factors will determine whether the union is successful
- \_\_\_\_ 17. I listen more than I talk
- \_\_\_\_ 18. When I'm not sure what someone said or means, I ask for clarification
- \_\_\_\_ 19. Members and stewards usually do what I ask them to do
- \_\_\_\_ 20. Members generally respect and like me

## **Self-Test (continued)**

**For each statement or question, mark your response using the following scale:**

- 1 = *never/strong disagree*

- 2 = *sometimes/disagree*  
3 = *occasionally/neutral*  
4 = *usually/agree*  
5 = *always/strong agree*

### **Section C**

- \_\_\_\_21. I know who to ask for help or advice
- \_\_\_\_22. I ask for help or advice when I need it
- \_\_\_\_23. I have and use manuals and books which explain how to do my job
- \_\_\_\_24. I have the opportunity to watch and learn from experienced representative doing their jobs
- \_\_\_\_25. I attend workshops and other training as needed
- \_\_\_\_26. I have access to people who give me honest opinions of my work
- \_\_\_\_27. I ask for and accept constructive criticism and advice
- \_\_\_\_28. After key events (a victory, a setback, a new program) and every-so-often, I ask, "what did we learn from that?"
- \_\_\_\_29. I don't fake it--if I don't know something, I find out or get help
- \_\_\_\_30. I am qualified and trained to handle the many different aspects of my job

## **Self-Test (continued)**

**For each statement or question, mark your response using the following scale:**

- 1 = *never/strong disagree*  
2 = *sometimes/disagree*

3 = occasionally/neutral  
4 = usually/agree  
5 = always/strong agree

## **Section D**

- \_\_\_\_ 31. My primary job is to service the members
- \_\_\_\_ 32. Basically my job is the same as management - I just do it for the members and they do it for the employer
- \_\_\_\_ 33. There is a never ending flow of problems and I try to solve each one
- \_\_\_\_ 34. I measure my success by how many member problems I resolve myself
- \_\_\_\_ 35. Getting members involved is a nice ideal, but I have to do the important things myself
- \_\_\_\_ 36. It is better to take longer to get a problem solved if it builds the union in some way
- \_\_\_\_ 37. My primary job is to organize the members to solve their own problems
- \_\_\_\_ 38. A major part of my job is identifying activists and stewards, training them, backing them up and helping them
- \_\_\_\_ 39. I find ways to enjoy my job and make it interesting and/or fun for the members
- \_\_\_\_ 40. I do my job in ways to teach the members how the union works, encourage participation and make the union stronger

## **Self-Test (continued)**

**For each statement or question, mark your response using the following scale:**

1 = never/strong disagree  
2 = sometimes/disagree  
3 = occasionally/neutral

4 = usually/agree  
5 = always/strong agree

## **Section E**

- \_\_\_\_ 41. The problems of members seem to get more trivial everyday
- \_\_\_\_ 42. Members expect miracles and won't lift a finger to help themselves
- \_\_\_\_ 43. No one understands how hard my job is
- \_\_\_\_ 44. I never have time to take on the important projects because I'm loaded down with minor problems
- \_\_\_\_ 45. I get angry often
- \_\_\_\_ 46. The boss is easier to deal with than the members
- \_\_\_\_ 47. Given a choice between taking the time to explain a task or do it myself, I usually do it myself
- \_\_\_\_ 48. This job makes it impossible to have a decent family life
- \_\_\_\_ 49. I don't have time for outside interests
- \_\_\_\_ 50. I have symptoms of stress--difficulty sleeping, irritability, health problems, etc.

## **Self-Test (continued)**

**For each statement or question, mark your response using the following scale:**

1 = never/strong disagree  
2 = sometimes/disagree  
3 = occasionally/neutral  
4 = usually/agree

5 = *always/strong agree*

## **Section F**

- \_\_\_\_ 51. I am good at explaining to members how and what the union does
- \_\_\_\_ 52. I am confident I can bargain contracts
- \_\_\_\_ 53. My investigations of grievances and problems are complete, and I get to the bottom of cases
- \_\_\_\_ 54. I am able to reach good settlements of grievances and other problems with management
- \_\_\_\_ 55. I know how to create a good paper trail
- \_\_\_\_ 56. I can present a case to a grievance panel or arbitrator
- \_\_\_\_ 57. I get members involved in solving problems
- \_\_\_\_ 58. I know how to talk to an unorganized worker or member and find out his or her issues
- \_\_\_\_ 59. I can evaluate a good potential organizing target
- \_\_\_\_ 60. I can spot, train and develop good potential stewards and activists
- \_\_\_\_ 61. I can write a simple, clear letter, grievance, report, brief, etc.
- \_\_\_\_ 62. The meetings I run are short and to the point. We make decisions, give out assignments and people usually do their assignments

## **Self-Scoring**

### **Section A**

A low score (under 30) indicates that you need to get your work better organized or you risk a lot of wheel spinning, complaints from members and stewards, stress, and gaps in the strength of your area. Start by listing (on paper or on your computer) every work location you represent. Consider taking a workshop or reading about time management and other organizational skills. Find another

union rep you think is well organized and ask to see her/his systems for organizing her/his work. If possible follow her/him for a day or more and observe.

### **Section B**

A low score (under 30) here indicates that the way you relate to people may be getting in the way of your effectiveness. Consider taking workshops or reading books on listening skills, assertive communications and other aspects of dealing with people. Ask for honest feedback from people you trust on how you come across to others.

### **Section C**

A low score (under 30) here indicates that you need help or information and you don't know where to get it (are afraid, unwilling or unable to ask for help). If you can't get help from your own Local, see if you can get help from someone at a nearby local union, joint council, state council, trade division, etc. Call the IBT Training and Development Department or a local University Labor Studies department to find out about workshops, manuals and books they recommend. Attend workshops to make contacts with other reps who you can call for advice and help.

### **Section D**

A high score on questions 1-5 (over 20) and a low score on 6-10 (under 15) indicates that you view your job in the traditional terms of servicing the members one at a time and one problem at a time rather than organizing them to solve their own problems. It will be difficult to build the union and get members active if you continue approaching the job this way. Attend workshops or read about the servicing model vs. organizing model. Evaluate honestly how well you are doing in building the union, getting members to understand it is their union and that they have to get involved.

### **Section E**

A high score (over 30) here indicates real danger of burn out. You have to make some changes soon or you risk serious health effects, reduced effectiveness and perhaps an "involuntary change in your status" (fired, not re-elected, etc.) Take some time off to clear your head. Then read and try to implement the suggestions in the *Organizing Your Work* and *Evaluating Your Area* sections of *Reps Roles*. Exercise, spend time with your family, get help from others in your union, and try to do the other things you know are good for you. Don't try to fix everything all at once--you are bound to fizzle out. Start by making one or two changes at a time and don't do more until you have incorporated those changes into your routine.

## **Section F**

A low score for any question in this section indicates you need to learn more about that particular skill. Read more, observe someone doing that skill, attend a workshop or see if you can apprentice with someone experienced. Evaluate how you are doing in this skill area and learn from your mistakes and successes. Ask someone for feedback on how you are doing and how you could improve.