



A Guide to Organizing for Teamster Member Organizers



Training and Development Department
International Brotherhood of Teamsters

Table of Contents

Introduction.....	3
Teamster Comprehensive Campaign Stages.....	7
House Calls.....	8
Typical Questions & Answers About the Union.....	13
Worker Rights.....	19
Representation Election.....	20
The Employer Campaign.....	21
Identifying Leaders.....	24
Logistics.....	25
Record Keeping/Assessments.....	26
Organizing is a contact sport “The Blitz”.....	31
Authorization Cards/Petitions.....	32
Committee Building.....	33

Introduction

Organizing is the most difficult and important challenge facing the labor movement today. Our purpose in organizing is twofold: to increase our membership, and to increase the bargaining power of the Teamsters. You are the backbone of our union, the heart and soul of making this happen.

Successful organizing drives require an understanding of employer anti-union tactics, an ability to understand and empathize with workers' issues; a credibility that inspires trust and motivates people to stand up for their rights, and; perhaps most of all, a heartfelt belief in unionism.

Tens of thousands of workers join together successfully and join unions every year, both in the private and public sector. The organizing arena is hard and unfair, but with your help workers can and do win.

Why Organize?

Bargaining Power:

Our Union's ability to win good contracts is based on bargaining power. Bargaining power is a reflection of the solidarity and degree of organization within a geographic location and industry. Organizing must take place on a regular basis in order to protect union wages and conditions and allow for improvements in future contracts.

Political Power:

The clout of working people in the political arena depends upon the degree of organization. When more people are organized into unions, we will have a greater ability to elect pro-union candidates who will pass pro-worker legislation. We cannot afford to wait for things to get better politically; we have to make it happen by organizing and strengthening the labor movement.

Labor's Mission:

It has always been the mission and mandate of the labor movement to organize the unorganized. It has been the struggle of previous generations that has given us the benefits and standard of living that union members enjoy today. It would be wrong for this generation of Teamsters to abandon this struggle.

"History will judge us by our ability to uphold the Teamsters tradition of making people's lives better. I am confident that through our growing solidarity we can build a foundation that will make the lives of our children and their children better through our actions today."

- James P. Hoffa, Teamsters General President

Teamsters Comprehensive Campaign Stages

Overview of an Organizing Drive

The Teamsters Comprehensive Campaign Stages are associated with higher win rates and/or have statistically significant positive effects on election outcomes. The use of an individual tactic within a stage is not enough; instead, gains depend on a multi-faceted campaign utilizing as many of the tactics as possible and following the basic stages. By basing strategy and tactics on these fundamentals, organizers can design campaigns that give workers their best possible chance to win.

Phase 1: Recon

Strategic targeting & campaign decisions

Recon is the process of gathering and analyzing information about an organizing target. At this phase decisions can be made whether or not to launch an organizing campaign.

Phase 2: Identify and Recruit Leaders

ID 'Natural Leaders' in all areas and shifts

During this phase you identify the workers are leaders in the work place and recruit them to join the effort.

Phase 3: Build Committee

15% committee based on leaders

Building an active representative group of trained workers willing to take responsibility for the campaign.

Phase 4: Build Majority Support

ID 65% or more support of workers

Having a strong, educated organization inside the workplace ready to take on the employer.

Phase 5: Recognition/Election

Certification of strong majority union

Escalating internal and external pressure and building a strong majority, recognized by the employer.

House Call Visits

Studies of organizing drives reveal one paramount conclusion: the success of most organizing is based on one-on-one communication. Just as the employer's campaign depends upon one-on-one persuasion, the union's campaign must be based on face-to-face communication on a regular basis with bargaining unit employees.



The entire strategy for union organizing stems from this fundamental premise. People make up their minds not based on written materials, but on conversations with people they trust.

One-on-one organizing takes place first between the organizer and the committee, and then between the committee members and the rest of the workers.

In most situations, the union organizer lacks access to the workers on the job. Therefore, house calls are an important part of most campaigns. Even where the organizer does have access, house calls can provide an effective way to begin building a strong relationship with a potential leader. House calls take place throughout the campaign, but serve a different purpose at different stages of the drive. Initially, house visits are used to recruit an organizing committee. Later, home visits can help expand the committee, let organizers visit card signers, win over undecided voters, build the majority and assess support as the campaign unfolds.

House Call Agenda

Whatever the basic purpose of the house call, the organizer should always have an agenda for the visit. In initial visits, the house call agenda will typically be:

1. **Introduction**
2. **Identify Issues**
3. **Educate**
4. **Inoculate**
5. **Call the Question**
6. **Move to Action**
7. **Identify Leaders**
8. **Set the Stage for Return Visit**

Introduction. Start by introducing yourself and saying something like, “I’m _____ from the Teamsters Union. Some of your co-workers contacted us and we agreed to visit some people to try to learn a little about conditions at your workplace. May we come in and speak for a few minutes?”

Listen for Issues. Each worker will have a different perspective on conditions at work. Let the worker discuss a range of issues before getting into issues about the union. Get to know who you are talking to before making your points. Listening can be easier said than done. Try these tips to help you become an active listener:

Tips for becoming a better listener:

- ◆ **Give full attention** to the other person.
- ◆ **Don’t get distracted** by your own concerns, cares or opinions. If you’re thinking about what you’re going to say next, you’re not listening.
- ◆ **Show interest.** People know when your being phony. Lean toward the person or nod your head slightly to show you care and hear them.
- ◆ **Don’t interrupt.**
- ◆ **Keep an open mind.**
- ◆ **Have patience and discipline.** Hearing someone out takes time.
- ◆ **Listen for ideas and concepts.** Don’t get sidetracked by the details or trivia that, oftentimes, will emerge. Examples sometimes illuminate what the worker cares about. Read between the lines for clues of what the worker is really trying to tell you.
- ◆ **Focus** on content, not delivery. The person might be anxious or pressed for time. Don’t get distracted by the way someone talks to you. Instead, try to hear what they’re saying.



Everyone is motivated or moved by something. Some things move us more strongly than others. Your job is to find out what really drives that individual. Organizers must listen for what that worker cares about.

Notes _____

Tips on One-On-One Communication

- ◆ **Introduce yourself and the subject you want to talk about.** Most people like to have a little warm up conversation before they get into talking about business. Break the ice first.
- ◆ **Listen.** Don't give speeches. Be responsive to the worker's concerns. The best house callers are the best listeners. Draw the person out. Ask questions such as: "How long have you been with the company?" "Who did you drive for before?" "Have they done anything about the problem we just discussed?"
- ◆ **Don't assume.** You may think you know what the issues are, but frequently you will be surprised. Different issues matter to different people. Again, ask and listen.
- ◆ **Don't argue.** You are not trying to win a debate. All you do by arguing is offend the person. Always try to find common ground. Look for points of agreement, then politely suggest other points of view.
- ◆ **Always be honest.** Don't promise what the Teamsters Union can't deliver. Never invent information. People respect honesty, not arrogance. If someone asks you a question to which you don't know the answer, tell them that you don't know, but that you will find out and get back to them. Then, do it.
- ◆ **Don't make a sales pitch.** Organizers are not salespeople offering them a better wage and benefit package. Your job is to assist workers in their own efforts to win a voice on the job.
- ◆ **Involve family members.** Their support will be critical as the campaign progresses. Consider involving spouses in the organizing. Provide childcare for meetings when necessary.



Notes _____

Educate

Tell workers about your union, its history, its culture, and its long standing pledge to help workers achieve a middle class standard of living with higher wages, benefits, safe working conditions, along with dignity and respect on the job. Tell workers that it takes people like yourselves to make this happen.

As Teamsters we have a rich and exciting history. Our history should be shared with workers as part of the educational process for potential members.

Did you know?

1. In 1903, two separate horse team drivers merged and formed the International Brotherhood of Teamsters.
2. Current membership is 1.4 million and growing.
3. Our industries and crafts are as diverse as the people in them. From airline pilots to zoo keepers including nurses, doctors, law enforcement personnel, food processing workers, truck drivers, warehouse workers, small package delivery, bus drivers etc.
4. Teamster master contracts have put more families into the middle class than any other event in labor history.
5. Teamsters supported equal pay for all workers doing the same job regardless of gender or race 60 years before the U.S. Government did.
6. Teamsters have always had an ongoing Disaster Relief Fund to help members in need whenever disaster hits.
7. Teamsters were known as the Knights of the Highway because they always stopped to help drivers having trouble on the road.
8. Teamsters have developed more safety programs in industries and training schools for drivers than any other union.
9. Teamsters give away ten of thousands of dollars every year in scholarships for members' children.
10. Teamsters have won the highest military and Presidential honors than any other union workers.
11. The Teamster horses are named Thunder and Lightning.



Typical Questions & Answers About the Union

The following are some sample questions from workers and suggestions on how to answer them in ways that keep us on our message. Notice that when management brings up their distracting issues, we don't want to dismiss people's concerns out of hand. We acknowledge their concerns and then bring the conversation right back to the worker's issues.

Also notice the effectiveness of using examples from other workplaces that have a union contract. It is much more effective to use concrete, real-world examples to highlight the union difference, rather than abstract, theoretical improvements.

Question: **The idea of a union sounds good, but what do we do if we can't get results? I don't want to go on strike . . .**

Answer: I'm sure all 1.4 million Teamsters were concerned too when management brought up strikes during their organizing campaigns. But for most of them, it turned out not to be an issue. More than 95 percent of all Teamster contracts are settled without a strike. Remember, no one can make you go on strike. The only way a strike ever happens is if members decide it's necessary and make that decision in a democratic vote.

Management would rather have us talking about strikes instead of about what we stand to gain by forming a union. They know as well as we do that we can do so much more by forming a union. For example, the employees at _____ . . .

Question: **Our supervisor said management can permanently replace us if we go out on strike—we would lose our jobs. Is that true?**

Answer: Sounds scary, doesn't it? That's why management is talking about it. It's typical of the kind of exaggerated claims management makes when they aren't ready to see their employees form a union. It's normal, but it's temporary. It'll stop when they get used to the idea that employees are going to have a voice in decisions.

First of all, strikes are rare. And when they do happen, the law puts strict limits on management's ability to replace striking workers. And let's face it, trying to replace everyone who works here would be very difficult. What's really happening here is that management is bringing up strikes to try to distract you from what workers gain by forming unions. For example, at _____ . . .

About conflict at work

Question: Ever since the union came here it seems like there's been a lot of tension. I'm not sure it's worth it.

I understand your concern—nobody wants to come to work every day to face conflict and hassles. We'd all like to get along with our supervisors. But the tension is just temporary. Employees who have already formed their unions will tell you that the tension goes away when the campaign is over.

It's normal for management to have a hard time with the idea of us forming a union and having a voice in our workplace. But they will get used to it, and things will be better than they were before because everyone will have a better way of solving their problems. At _____, for example, employees have been able to . . .

Question: I've got a great working relationship with my supervisor. If supporting the union means that I have to be against her, I just can't do it.

Answer: Of course not—that's perfectly understandable. But forming a union isn't an attack on your supervisor. Employees who have formed unions elsewhere have found that they continue to have a good relationship with their supervisors. This isn't about "us versus them." It's about working together to make this a better place to work— even for your supervisor.

Your supervisor may have been told by upper management to talk to you and say certain things about the union. That's normal—it happens just about every time workers form a union. Once the union is formed, management learns to live with employees having a voice. The tension goes away and improvements are made for everyone—including supervisors.. Guidelines and policies are clear, and many of the problems that used to cause tension are resolved.

About ‘another chance’

Question: Management admits that they’ve made some mistakes and they’re asking for another chance. We can always form a union later if things don’t improve, so why shouldn’t we give them a chance?

Answer: Isn’t it great that management admits the need for improvements? It shows that even before the union is official, the fact that employees are working together is getting some results.

This same thing has happened at most places where employees have formed a union. At first, management has a hard time getting used to the idea of workers having a real voice, so they say a bunch of negative things and then make some promises to do better in the future. But at those other places, the employees went ahead and formed their unions because they figured that it was the best way to give management “another chance” to make improvements—and the only way to hold management to their promises. At _____, for example, a union has made a real difference in improving . . .

About doubts and futility

Question: How can we be sure we won’t be worse off with a union?

Answer: First of all, it stands to reason that employees are more likely to make improvements when they join together instead of go it alone. Second, the only way you could be worse off would be if you and your coworkers agreed to a contract that gives you less pay and benefits, and who would ever do that? Finally, if management really believed you’d be earning less with a union, they’d be encouraging it—not resisting it!

Forming a union is not some sort of new experiment. More than 1.4 working people from all kinds of industries are already Teamsters. By forming a union, they’ve been able to achieve better pay and benefits. They have a voice in decisions that affect them. Their rights are guaranteed and protected in a written contract that management has to follow. They have a grievance procedure to resolve problems when they arise. There’s no reason why the employees here can’t make improvements too.

Question: Management says they would gladly give us big raises and better benefits, but there just isn't any money. They say the company is having some financial problems and this could put it over the edge . . .

Answer: If your employer claims to have financial problems, employees should have a voice in figuring out what the company can and can't afford. Forming a union is the only way to have that voice. Those same claims have been made by management at other companies, and then, once employees have formed a union, somehow they could afford to make improvements. But that's for management and employees to work out here *after* you form your union.

Question: I've heard that the law says we start from scratch when we go to the bargaining table. We could lose everything we have now and have to negotiate just to get back to where we are now. Is that true?

Answer: No. Absolutely not. The truth is just the opposite—once you've voted for your union, everything you have is protected. Management can't change your pay, benefits, or working conditions without your approval. You start negotiating your contract from where you are now and build on it. Look at what the employees at _____ gained by forming a union.

It's really kind of funny. If management *really* thought they could pay you less if you formed a union, they'd be all for it!

Question: Management just showed us the union contract from _____. People there make less than we do. Why should I join the union and risk winding up with less than I have now?

Answer: Every contract is unique and starts from what you have now. At _____ they started out much further behind than you. In their contracts they've made tremendous progress compared to what they had before the union: better wages, benefits, and working conditions. That's what will happen here—you'll negotiate a contract that will provide improvements from what you currently have.

You say you make more than the employees at _____? Great! You'll be that much farther ahead when you sit down to negotiate your first contract.

Question: I saw this "management rights" clause in one of your contracts. What's the point of organizing if management still gets to make all of the decisions as they please?

Answer: They don't. Obviously, it's management's business to run the business, and that's what that clause says. But the rest of the union contract gives employees a voice in all of the decisions that affect them—from hiring and firing to compensation to working conditions. Right now, management can do whatever it wants and employees have no voice. But once you form a union, management has to negotiate with you over issues like wages, health insurance, paid time off, etc.

Every union contract has a management rights clause, and every member of our union has made progress on the issues that matter to them.

Question: Unions can cause problems. A good friend of mine was in a union and the company she worked for shut down one of the shifts. She got laid off because she didn't have seniority and the union didn't fight for her.

Answer: Forming a union doesn't mean that tough problems and difficult situations will never occur again. What it does mean is that when problems do come up, employees can work together to resolve them. Without a union, there'd be no way to stop layoffs if they were being proposed, no way to influence how they happen, and no way to go out and get community support for alternatives. With a union, on the other hand, you'd have a voice. That's the big difference. At _____, here's how having a voice has made a difference in solving problems . . .

About union dues, bylaws, salaries

Question: What happens to all the money paid in dues?

Answer: Every bit of the dues money is spent on assisting union members in building their organization. Dues money pays for the costs of having an organization and representing members: contract negotiations, grievances and arbitrations, political and legislative campaigns that affect jobs and our profession, legal fees, etc. Every effective organization needs some kind of funding, whether churches, clubs, sporting leagues, or the like, and the union is no different.

There are 1.4 million Teamsters who have found that the improvements they've made in their workplaces are more than worth the investment they make in dues. Just to give you an example, the employees at _____ . . .

Question: I saw a paper that listed the union officers' salaries. Why are they paid so much? Isn't that wrong?

Answer: Union members decide the salaries of their officers. A local union's budget is reviewed and approved by members in the local. Members elect their officers and they can vote them out of office.

The more important question to ask is: Why is management raising this issue? It's yet another way of distracting us from the real problems we want to solve by forming a union. Management at other businesses have brought up these things too when their employees formed unions because they weren't used to the idea of employees were able to work with management to in their jobs. For example, at —, employees negotiated.....

Question: A supervisor showed me a copy of your bylaws today. It said you could fine us. Can that really happen?

Answer: Every serious organization has bylaws. The bylaws protect the democratic rights of members to run their own organization and to hold their leadership accountable. They are established and voted on by their members. Obviously, union members would not set up a system where they would be fined. And they didn't.

Any serious organization has to have procedures for dealing with people who do wrong. For example, if someone steals money from the local, there needs to be a way of dealing with that and protecting the members' organization. That's what the bylaws protect against. They're not aimed at the average member in good standing.

Worker Rights

Workers have the legal right to organize, and it is against the law for employers to discriminate against employees for exercising this right.

This right is contained in several laws which cover different groups of workers. The National Labor Relations Act establishes the legal framework for organizing and collective bargaining in the private sector. The federal sector is governed by the Federal Labor Relations Act. Railway and airline workers are covered by the Railway Labor Act. And state, county and municipal workers are granted rights under various state and local laws, as well as under the Constitution.

The rights granted to workers under these various laws are similar. This chapter will discuss the National Labor Relations Act, in particular.

As anyone involved in organizing campaigns knows, there are many problems with the National Labor Relations Act. Penalties against employers who violate the law are very weak. And, employers can abuse the process by seeking lengthy delays. Nevertheless, it is important for organizers and committee members to understand the basic protections offered by the law and how to prosecute employers under the law.

The National Labor Relations Act ("NLRA") declares that the policy of the United States is to encourage "the practice and procedure of collective bargaining and (to protect) the exercise by workers to full freedom of association, self-organization, and designation of representatives of their own choosing, for purposes of negotiating the terms and conditions of their employment or other mutual aid or protection."

Representation Election

Representation elections are triggered by workers through the signing of authorization cards/petitions. The specific federal or state agency that authorizes and conducts the election depends on the industry and type of work performed. The most familiar agencies are:

- ◆ **National Labor Relations Board** (created by the National Labor Relations Act)
- ◆ **National Mediation Board** (created by the Railway Labor Act)
- ◆ Public sector workers are covered under agencies specific to the federal government or particular state.

If you are not familiar with the particular procedures of the NLRB or the NMB, contact your local union.

The following section covers elections under the National Labor Relations Act:

A showing of support. A union which believes it has majority support files a petition for an election with the Labor Board. In support of its petition the union must present the Board authorization cards or petitions from at least 30% of the workers. However in order for workers to win they must win by 51%. The Teamsters Organizing program strives for at least a 65% showing of support based on the organizing assessment system. It has been shown that there is a 20% drop off of union support at the time of the election due to a variety of reasons, thus you should make sure there is enough support to win allowing for the drop off. (Note: These cards are sent to the Labor Board, not the employer.)

Before holding the election, the Labor Board decides which job classifications are eligible to vote. The classifications which will be included in the “bargaining unit” are determined either through an agreement between the union and management (a “stipulation”) or through a formal hearing. There are certain rules about what constitutes “an appropriate unit” under the National Labor Relations Act. (See Bargaining Unit Rules section.) The election takes place on average about 40 days after the petition is filed, although it can be a shorter or longer period.

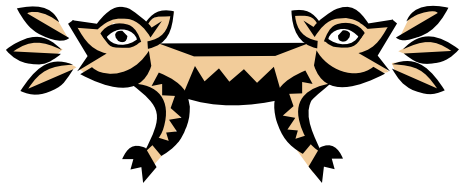
The vote itself is a secret ballot election conducted by the Labor Board, usually at the worksite. The employer is not allowed to present a “**captive audience speech**” **within 24 hours of the election. No electioneering is allowed at or near the polls, and union supporters may not keep lists of who has voted.** The union must get 50% + 1 of the votes in order to win.

Within seven days following the election, either side may file objections based on the other party’s conduct during the period up to and including the election.

Inoculate Against The Employer Campaign

In the vast majority of campaigns, employers enlist the help of expensive anti-union consultants to fight workers' attempts to organize. While the basic campaign strategy was developed by non-lawyers, lawyers now have gotten heavily into the field. Each consultant favors certain gimmicks, but the basic campaign is as predictable as it is vicious.

Workers need to be warned about what to expect from their employers. It's up to you to prepare people, or "inoculate" them, against management tactics and dirty tricks before management has a chance to use them. They'll use them anyway, but the workers will be prepared. Having warned workers beforehand, the anti-union attacks will be much less effective.



The employer campaign is a two-headed monster. On the one side is the "nice guy" approach. The employer is willing to listen to a grievance that can be resolved; makes promises that can or cannot be delivered. Getting rid of the unpopular supervisor is part of the "nice guy" package. Surveys show that this aspect of the employer campaign can be the most powerful and effective--particularly when the boss tearfully begs for a second chance. And after all, this nice guy approach only has to last until the end of the campaign.

Then there is the campaign of fear. The messages are that people will lose their jobs and benefits and that people will have to strike and will be permanently replaced. Management tells them bargaining is futile, because management doesn't have to and won't agree to anything. Individuals are made to fear for their jobs. Employers smear unions as corrupt institutions. All of these scare tactics are lies designed to stop the organizing drive the workers want.

One-on-one conversations between supervisors and employees are the principal way of delivering anti-union messages, and the lynchpin of the employer campaign. Supervisors target individuals, rate them on their union views, and begin a constant campaign of pressure, day after day, week after week, during the organizing drive.

Notes: _____

In addition to "one-on-ones," workers are bombarded with letters mailed to their homes, leaflets, news clippings, posters, and videos. There are also gimmicks such as shopping carts filled with groceries that could be bought with a year's dues, tombstones marking the dates of the closing of union companies, and raffles where people guess the number of strikes the Teamsters Union has had. Usually "captive audience" meetings held on work time, bring together small or large groups of workers to hear management's message.

There are also anti-union committees, formed by workers, but secretly manipulated by the employer. These groups can put out their own leaflets, and don't have to worry about breaking the law. The employer will also run their own anti-union campaign.



Anti-union consultants also force lengthy delays by abusing the election process which gives the employer additional time to do its dirty work..

At the end of the employer's campaign there is always a last-minute bombshell. Whether it is a strike scare or a nearby plant closing, workers should be warned to expect something at the last minute that the employer has been saving.

The refusal of the Labor Board to put restraints on this overkill leads to an intensely intimidating and conflict-ridden environment during the campaign. Some of these employer tactics are legal, some are not. The boss's hope is that workers will lose sight of the issues that caused them to want to form a union in the first place. It is remarkable that, given this assault, unions win over half of the elections. The union's campaign must be designed to counteract this campaign of individual pressure and propaganda.

Notes _____

Call the assessment question. The assessment question will change depending on what phase of the campaign you're in. Do not leave without asking if the worker supports the organizing efforts.

Move to action. Each house call should build the organization in some way. Give the worker a task, remember to start small and gradually increase the level of activity.

1. **Ask.** The best way to get someone to do something is to ask them personally. This is infinitely more effective than trying to recruit through a mailing or phone call.
2. **Clear job description.** People are more willing to begin with the things they know they can do. When they accomplish something, they are more confident and will participate more the next time.
3. **Encourage questions.** Remember that most people have never been through an organizing campaign before and they probably don't know what tasks are involved or what is meant by "authorization cards" or "house calling."
4. **Explain how their role fits in with the rest of the campaign.** People want to understand what they are a part of and tend to work best when they know that others are depending on them.
5. **Start small and build.** The first time you give someone a task, start small. Ask for three addresses and a phone number, not for 150 addresses in two days—they will probably fail and you will lose a potential activist. Workers will be able to do more as their confidence builds.
6. **Keep people accountable.** At each meeting always check to see if and how the person did with their assignments. This sends the message that the work is important and helps to identify problems early.
7. **Explain how their participation will help improve workers' lives.** Be enthusiastic about the importance of the work. People will work hard and take enormous risks if they truly believe they can make a difference.

Initial Ways a Worker Can Get Involved

- ◆ Help with list building
- ◆ Give names and addresses of co-workers
- ◆ Accompany the organizer on a house visit (a friend)
- ◆ Get list of workers, employee handbook, benefits package, or other information
- ◆ Map out the facility or department
- ◆ Attend a meeting
- ◆ Join the organizing committee
- ◆ Sign a petition or a card
- ◆ Take cards or petitions
- ◆ Turn workers out for an event

Identify Leaders

Identify and keep a good record of who the natural leaders are in the workplace – who has the most respect and influence among co-workers in various groups in each job site, terminal, department, work classification, demographic, social group, etc.

Don't assume because people have what you consider "leadership qualities" (integrity, reliability, a good talker) that they necessarily have a following in this workplace. For this phase of the campaign, the most important thing to know is who actually has influence and respect AND a following among other workers. We are not just trying to find out who's pro-union.

Work with the list, if you have one, and with your initial group of union-friendly contacts to begin asking questions like:

- ◆ Who's the most important driver for me to talk to – the one person who, if they were on our committee, other drivers would listen to?
- ◆ Who do other workers really respect, someone that does a good job and has been here a while?
- ◆ If there's a problem at work, is there someone others go to help resolve it with the foreman or management? Is that person respected?
- ◆ Are there workers that speak Spanish? Is there anyone from that group that seems to be the spokesperson or is highly respected by the others?
- ◆ There's a Wednesday morning prayer breakfast that a bunch of people go to. Is there someone who organizes that group? Are they thought highly of?

Confirm Leaders

Some may not have been identified by others as "leaders." When it's time to talk to more workers about the Teamster organizing campaign, double-check with them about identified leaders. Ask what others think of that person. Ask the same questions (above) of several different workers in the group. When you ask the right questions and get two or three confirmations of a worker's influence, you know you have the key person that others in that group will really pay attention to, even if the going gets rough (employer intimidation). You have someone with a track record who can move other people to act. But remember, at this stage they can move others to act FOR or AGAINST the union.

Notes: _____

Record keeping & Assessing Levels of Support

Methodical recordkeeping is one of the most important jobs of the Teamster organizer. Without good records, it is impossible to make correct decisions about strategy and tactics.

1. **Name and Address List.** The names and addresses of unit employees are the most vital tool an organizer can have. Organizers should have a complete list early in the campaign, even before the campaign becomes public. The list should include anyone who may or may not end up being included in the bargaining unit. Never be in the position of waiting for an “Excelsior List” (which the employer must provide 10 days before the election) to know who is in the unit.
2. **Worksite Chart.** The organizer should begin with the assistance of the committee early in the campaign to develop a chart of the worksite, drawing in each worker. This chart is useful for several reason: 1) to visualize the union’s strengths and weaknesses; 2) to be sure that work areas and departments are not overlooked; 3) to identify who the supervisors are and to become aware of the proximity and interactions of various work groups.
3. **Computers.** Keeping records on a spreadsheet or database is very useful, especially in large campaigns. Computers help generate information, for example, on who lives in which zip code, which is a time conserving tool when routing house call visits. They can tell you if there are certain groups within the workplace that you are not reaching.
4. **House Call Sheet.** You should have a written record of each worker and a house call sheet that’s filled out after each and every house visit. There is a space provided for things like workers’ issues, concerns, comments as well as a place to write down names of leaders that have been identified by the workers, assessment rating, organizer’s name and date of contact. The dates and times of “not at home” should also be included in order to identify patterns so that the organizer is not wasting time attempting to visit during unavailable hours.
5. **Debrief Sheet.** A debrief sheet should contain the number of house calls totaled for the day, the number of not-at-homes, and a break down of all the assessments made each day. It should be filled out by the organizers at the end of the day and should be included in the house call sheet packets and ready to de-brief with the lead organizer..

Notes: _____

HOUSECALL/CONTACT SHEET

Not Home date(s) Time & Initials

Name		Male		
Address		Female		
Phone #		Race/ethnic group		
Cell #				
E-mail				
Employer		Senioity		
Site (facility location):				
Shift	Dept/Class			
Days Off				
Contact person/s			Card/Petition	Date

ASSESSMENTS

Place of contact?(circle one)	Housecall	Job site	Customer Site	Other	
Organizer(s)					Date Time
Issues					
Union Fears/Concerns					
Leaders I'd			Task		
			Follow Up		

How would you assess this worker today? (Circle one)

1	2	3	4	5
Active com- mittee, signed card(if asked	For the union, signed card (if asked)	Unsure or wants more information	Not interested leaning against may have issues	Anti- or refuse to talk, no real issues

Place of contact?(circle one)	Housecall	Job site	Customer Site	Other	
Organizer(s)					Date Time

Assessments

Organizers have their own systems for indicating worker sentiments toward the union. An effective assessment system takes a “snapshot” of union support at a given time. Keeping track of likely votes is important in order to focus time and attention on people who are weak or undecided. It can also tell the organizer how to progress to the next stage of the campaign by using existing support effectively. Assessments are taken continually through every organizing campaign because opinions, issues and support change as the campaign progresses.

For example, in the early phase you need to know if there is potential for a campaign in a workplace. The goal of your assessment system during this phase is to find out how many people support the idea of a union at the workplace. An effective system will tell you whether or not you have sufficient support to begin signing up workers without ever having given out one card.

Assessments of attitudes toward the union should be based on objective criteria where possible, not only what people tell the committee or the organizer. Did the person sign a card? Has the person been to meetings? Have they provided any type of assistance? Is he or she publicly for the union? Which people have influenced this person and who does he or she influence?



Teamster Organizing Department Worker Assessment System

It is important that we all use the same criteria for making worker assessments so that when we're deciding strategy and tactics, we're not comparing apples to oranges. When in doubt, be conservative. If there's more support than we thought, that's great. But if we overestimate, we're in trouble.

To get a good assessment, ask the question directly: **Can we count on you to stand up with your co-workers and organize the union?**

1 Organizing Committee Member, must be for the union all the way, signs a card when asked, takes assignments and follows through, willing to be public supporter (when the time comes), gets information, signs up others

May say things like:

- "I'm all for it, what do I need to do to make it happen?"
- "I know a few people who are interested. Should I sign them up?" **NOTE:** Someone does NOT become a "1" based on what they say, but on what they do.

2 Definitely for the union, not ready to take a leading role (but signs a card, if asked)

May say things like:

- "I'm all for it, but I don't have time to get involved."
- "You can count on my vote, but I'm not going to stick my neck out."
- "Sure, I'll help out." (but doesn't follow through)

3 Not sure, wants to hear more or consult with others, think about it, etc.

May say things like:

- "I need time to think it over, why don't you give me your card."
- "I'll go along with whatever the others decide."
- "I want to talk it over with some other people on the job."
- "I can see good things and bad things about the union."

4 Not interested, doesn't think a union will work here, or afraid (**but may have issues**)

May say things like:

- "Unions used to be a good thing, but not anymore."
- "I wouldn't mind getting a better deal here, but the union will force the company out of business." (or "I had a bad experience with the union at my last job," or "I just don't think the union will help.")
- "We could use better health insurance, but I don't want to risk my job."

5 Anti-union, negative, or thinks things are just fine (**no issues**), or refuses to talk.

May say things like:

- "This is a great job, no problems whatsoever. We don't need your help."
- "You better leave before I call the cops!"
- "*(@%\$@!!!"

AUTHORIZATION CARDS/PETITIONS



Although the National Labor Relations Board only requires that 30% of the unit sign cards to get an election, organizers must insist on having a large majority because support can erode as the employer wages a fierce anti-union campaign. In general, cards should not be distributed to workers until a strong, representative committee has been built.

The cards are a good tool for measuring support for the union. Many organizers make the mistake of thinking the goal is file for an election when, in fact, the goal is to build a strong effective organization in the workplace that can take on the employer. If you build this kind of organization, you can get a majority of signed cards, participation in actions, and get recognition and a good contract. But first you have to build an organization.

Never, ever tell workers anything like, “This card is just to get an election,” or “No one will ever know you signed.” Weak cards cause us to make bad tactical decisions and may cause legal problems later.

If workers are reluctant to sign a card, go back to the issues they care about. Challenge them to do something about the issues, to stand up and be counted and to take action including signing a card. But make sure workers know that signing a card means they are strong union supporters and want to be Teamsters.

A card must be completely filled out, including complete contact information and date. It’s always a good idea to have the organizer or committee member who got the card initial the back in case there are any questions about it later. A partially filled out card, an undated card, or a card that was signed due to false or misleading information is worthless. The only majority that counts is the majority of strong committed union supporters.

While the majority of traditional campaign feature the signing of cards, some organizers use petitions instead. Proponents of this method argue that it creates additional momentum as workers see their co-workers sign the petition, and signing a petition requires a more open commitment than signing a card.

Notes: _____

Committee Building

Direct, face-to-face contact carries the most weight in winning an organizing campaign. The best way to make these contacts happen is through a well-respected, well-trained, in-house organizing committee. The committee must be representative of the composition of the workforce.

Even in units where a vast majority of the workers have signed union authorization cards, the election is lost if it lacks a strong committee.

Except for smaller units, the organizer cannot regularly communicate with all the workers. Yet the boss communicates with them every day, eight hours a day or more, tailoring different messages for different phases of the campaign and for different workers.

An in-house organizing committee creates a network of people who can meet workers face-to-face each day and provide the leadership necessary to stand up to management attacks. They create a sense of optimism and ownership over the campaign.

The goal is to build an **active** committee before the employer campaign begins. The definition of an active organizing committee is one that is:

- ◆ 10-15% of the workforce;
- ◆ Composed of the majority of the natural leaders identified in the workplace;
- ◆ Representative of the workforce by job type, department, shift, seniority; and representative of the workforce by gender, race, language, age;
- ◆ Trained and able to inoculate against the employer campaign, to conduct an issue campaign, to assess their co-workers, to activate their co-workers;
- ◆ Willing to talk one-on-one with co-workers;
- ◆ Willing to publicly support and work to build the union;
- ◆ Willing to engage in and help organize workplace and community actions.

An organizing committee allows workers to start acting like a union inside the workplace, builds confidence among members of the bargaining unit, and effectively counteracts elements of the employer's campaign. Committee building is methodical work; do not pick a committee based on who shows up to a meeting. Pick a committee based on the goals stated above.

TIP: Every workers on the organizing committee must be active, but not every active worker must be on the committee. Be thoughtful about recruiting committee members.

Role of the Committee

- ◆ **Conveys a Sense of Ownership.** Since the committee consists of their co-workers, employees feel a sense of ownership of the union and understands that the union is not some group of outsiders.
- ◆ **Provides Leadership.** The committee, by openly supporting the union, provides leadership and encouragement to the rest of the workforce. The process of organizing is the process of building an effective organization of workers. At meetings, committee members take part in planning the campaign and developing and implementing tactics.
- ◆ **Educates Co-workers.** As the committee learns more and more about what a union is, they continually talk with co-workers defending against the employer's campaign of intimidation and deceit.
- ◆ **Serves as a Network.** The committee talks continually with co-workers about the campaign and are the eyes and ears of the organizer. They tell the organizers what their co-workers think and talk about what the supervisors are saying. They help assess union support throughout the campaign.
- ◆ **Distributes Information and Signs Up Co-workers.** The committee is responsible for making and distributing literature. They are also usually the ones who sign up their co-workers on petitions or authorization cards.
- ◆ **Publicly** supports and works to build the union.

Committee Recruitment

Step One: Develop a good idea of the type of member you are looking for (representative of workforce, willing to be active, willing to devote time and energy to building a union.)

Step Two: Conduct a one-on-one meeting with the individual worker whom you wish to recruit. Describe what is expected of committee members, specify the contributions you feel the worker could make in building the union, and ask the individual if they are willing to make the commitment and serve as a committee person.

Step Three: Give the potential committee member a task that is appropriate but requires more activity than the individual has shown in the past. If the committee member achieves the task, give another task that requires more activity. If the committee member does not achieve that task, it is the organizer's responsibility to follow-up in a timely way and find out why the task was not completed. It may be that the committee member needs assistance, direction, or more time in order to finish the task. But if a pattern develops on the part of the committee member of not living up to committee responsibilities, place the worker in a role that might be more suitable.

The following are examples of committee tasks that escalate in difficulty:

- ◆ Get the organizer copies of the policy or benefit manual
- ◆ Talk about supervision and workplace issues
- ◆ Help build the worker list by identifying workers that they know
- ◆ Set a meeting between the organizer and the a co-worker
- ◆ Be a spokesperson for the workers at delegation visits to allies or at community support meetings.
- ◆ House visit co-workers
- ◆ Help get petitions signed by co-workers
- ◆ Sign a letter to the employer identifying him/herself as a committee member
- ◆ March on the boss with worker demands

TIP: Begin building committee with recruitment of natural leaders

Committee Development

Take care to expand the committee beyond the people initially the most pro-union. These workers will not necessarily be the most respected leaders. Although there can be a role for them as activist, a committee which does not contain a large number of the most respected leaders will not be successful.

It is important for organizers tot take time to identify and talk to those workers who are most respected, even if they-re not pro-union. *The time spent to win over the key leaders is time well spent.*

While committee recruitment is going on, keep this in mind: Don't surface to soon with a partial committee. It is a mistake. If a committee that's too small or not representative enough goes public, it will present the wrong face to the rest of the workforce.

Workers may get the impression that the committee is a clique and not strong enough to inspire their co-workers.

In forming the committee *organizers should pay close attention to the parts of the workplace where little support or of interest is shown for the union.* It's natural to spend time visiting workers in the most pro-union parts of the workplace, because organizers get he most favorable response there. But the key to winning will be to enlist those departments or groups who are not initially pro-union. If these workers are left to the end, they may feel left out of the process.

One critical decision organizers must make is *when or whether to tell management who is on the organizing committee.* The argument for sending the employer a letter with the names of the committee members is twofold: It solidifies the committee and offers some legal protection –the employer can't deny knowledge of who is on the committee.

Certainly, the committee cannot be effective if it stays hidden.

Once the decision is made to go public *organizers should take the committee in to action immediately*. For example, after the first committee meeting, committee members can together hand out a flyer announcing a union campaign.

Continue to add committee members to the campaign.

Getting Workers involved (committee or active members)

The more workers that are involved in the campaign, the more likely you will succeed in gaining recognition, securing a first contract, and building a healthy organization that will remain strong for years to come.

How do you recruit people as active participants?

1. **Ask.** The best way to get someone to do something is to ask them personally. This is infinitely more effective than trying to recruit through a mailing or phone call.
2. **Clear job description.** People are more willing to begin with the things they know they can do. When they accomplish something, they are more confident and will participate more the next time.
3. **Encourage questions.** Remember that most people have never been through an organizing campaign before and they probably don't know what tasks are involved or what is meant by "authorization cards" or "house calling."
4. **Explain how their role fits in with the rest of the campaign.** People want to understand what they are a part of and tend to work best when they know that others are depending on them.
5. **Start small and build.** The first time you give someone a task, start small. Ask for three addresses and phone number, not for 150 addresses in two days—they will probably fail and you will lose a potential activist. Workers will be able to do more as their confidence builds.
6. **Keep people accountable.** At each meeting always check to see if and how the person did with their assignments. This sends the message that the work is important and helps to identify problems early.
7. **Explain how their participation will help improve workers' lives.** Be enthusiastic about the importance of the work. People will work hard and take enormous risks if they truly believe they can make a difference.