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EXECUTIVE BOARDS IN ACTION!



VALUES & BELIEFS

Values are standards that guide our conduct in a variety of settings. Through them, we take positions on issues, choose our policies and evaluate our and others' actions and beliefs. Values are the guiding principles in our lives with respect to the personal and social ends we desire. When a group is clear about its values, the leaders are more able to make difficult decisions. Shared values are the foundation for building productive working relationships. When individual and union values are aligned, great things can happen.

1) What are two or three of the most important values that guide you in your life?

2) Which of these values prompted you to participate in our union?

3) What do you think are the most important values of the labor movement?

QUALITIES OF LEADERSHIP

Vision

Leaders have an agenda and a focus. They understand the importance of vision and know that vision inspires and transforms purpose into action.

Communication

Leaders are able to communicate their vision into a “shared vision.” They are able to capture peoples’ imaginations and inspire them to care about the same vision and to work towards making that vision a reality.

Determination

Leaders stay with an idea. They keep fighting to make it a reality. They understand that this persistence and focus leads to trust among those they work with.

Positive Self-Regard

Positive self-regard is not blind egoism. Leaders recognize their strengths and compensate for their weaknesses. They build upon their strengths by nurturing, striving and further developing the skills and talents that they have.

They assess their weaknesses and either identify resources to help themselves improve in those areas or delegate those tasks to others who are better suited.

One of the most important aspects of their self-regard is that it creates in others a sense of confidence and high expectations.

Empower Others

Leaders empower *others* to translate ideas into reality. Their style is one that *pulls* rather than pushes people in. It energizes and attracts people to believe in an exciting vision of the future.

The Essence of Empowerment:

Significance: People need to feel like they’re making a difference both for our union and for as larger cause and like they’re at the active center of the union.

Competence: Members need opportunities to develop and learn on the job.

Community: People want to feel joined in some common purpose and cause.

Enjoyment: Working together to make a vision become a reality should be a fun and enjoyable experience. Fun goes a long way in keeping people involved in the struggle.

Risk-Takers

Leaders don't focus too much on failure. They do believe, however, that their mistakes play a key role in becoming more creative and improving. They focus on what they want to have happen and when something fails, they simply see that as the beginning of a new approach and change in their strategy.

DUTIES OF THE EXECUTIVE BOARD

The Executive Board exists as a leadership body to work with the elected officers of the local. It is the governing body of the local, and its duties include:

- Deciding the local union's policies and setting goals in keeping with the Union's Constitution, By-laws and Resolutions;
- Establishing a long-term strategy to meet those goals;
- Developing and reviewing plans to carry out the Union's goals;
- Establishing union committees, sitting on these committees and guiding their work;
- Participating in the implementation of those plans;
- Recommending significant changes in policy, operation and goals to the membership;
- Monitoring the finances of the local;
- Having input into the agenda for the general membership meetings;

The Executive Board members constitute a team. It is responsible for the establishment of policy, goals and long-term strategy.

The Board does not manage the day-to-day activities of the Union nor supervise the staff.

COMMON CHALLENGES & PITFALLS OF EXECUTIVE BOARDS

The following is a list of common complaints and pitfalls of union Executive Boards. Many of these pitfalls can be directly related to problems of recruiting and maintaining E-Board members and with decision making.

Place a check in the box next to those pitfalls that you think currently apply to your Executive Board.

- Time on the Trivial.** Major program issues go unresolved while the board grapples with various details.
- Short-Term Bias.** The long-term future of the Union is a key responsibility of a board, but many boards deal far more with the short term, and often, with the past.
- Reviewing, Rehashing, Redoing.** A significant amount of time is spent reviewing what the staff has already done and/ or revisiting decisions that the Board's already made.
- Confusing Roles.** The staff receives conflicting directions and assignments from the President, Executive Director and/or the E-Board. Once the Board has made a decision on a particular direction or program, they try to micromanage the implementation instead of letting staff directors carry out the day-to-day work operations.
- Leaky Decision-Making.** The Board makes a decision as a group, but later, individual board members go back to their worksites and voice concerns with the decision.
- It's Just Perfect Attendance.** Board members think that their role begins and ends with their participation at board meetings. They don't always recognize their responsibilities outside of attending meetings.
- The Rubber-Stamp.** There are situations where the Board, rather than developing, debating and deciding policies or goals simply approves plans without questioning and/or fully understanding what is presented to them.
- Confusing Ends and Means.** Boards can become so engrossed in the many activities of the union that they lose sight of the results that these are designed to accomplish. There may be little measurement of the effectiveness of the Local's activities or projects.

- Ineffective Board Meetings.** Meetings are poorly organized and/or run in a way that very little that is meaningful is accomplished. Board members stop coming or are demoralized when they do. Real discussions and decisions may happen outside of the Board meetings and only among a small handful of Board members.
- Out of Touch with Membership.** Board members have forgotten to include the membership when making their decisions or have stopped trying to involve the members all together. Board members maintain contact only with a few members that they know personally and the Board has been unable to effectively communicate its message to the members and get them to support overall union plans. The Board has become a body that is out of touch with the memberships' needs, and the members may view the Board negatively.
- Second-Guessing Answers.** Board members quarrel about a policy or procedure rather than checking the Local's constitution and by-laws. (While these documents cannot cover everything, they should be the first source of reference that Board members check when there is uncertainty or disagreement.)
- Fragmentation.** Committees and/or individual Board members operate within their own agenda instead of working from a commonly developed plan. Committees don't have a full understanding of each other's roles; they don't communicate or share information with each other; and there is no sense of how their objectives connect to the Local's overall plans.
- Weak Accountability.** Committees aren't held accountable. Some follow deadlines and some don't. Some have full participation and developed goals while others do not. Inconsistencies in accountability weaken the Local's program as a whole.

ROLES OF BOARD & FULL TIME OFFICER/STAFF

Board

Full time Officers/Staff

Governs

Administers

Decides what

Decides how

Provides overall leadership

Are responsible for day to day management

Develops budget

Make budgetary recommendations

Monitors overall budget

Monitors day to day spending

Makes policy

Implements policy

Sets strategic direction of local

Has input into strategic direction

Creates the plan for the local's direction

Has leadership in implementing the plan

Leads executive board committees

Provides staff support to committees

Monitors overall progress

Monitors daily/weekly progress

Holds each other accountable

Is accountable to President

Is accountable to the membership

Is accountable to the membership

Self Analysis: How Do You Participate at Meetings?

Each statement below describes ways of participating at meetings.

Think about yourself and put a check by the level that best describes you.

Usually

Sometimes

Rarely

Self awareness of how I help the process

I help the group stay focused on the overall purpose of the meeting and specific agenda items.

I question my own assumptions.

I help people clarify their thoughts by asking insightful or thoughtful questions.

I am effective in summarizing where there is agreement and where there isn't.

I help draw quiet people out.

I help keep to the time limits agreed upon.

I work at understanding different points of

view.

I speak up when I think the process is breaking down and have suggestions for getting back on track.

Self Awareness of my level of participation

I don't let myself play the observer role when I should be a participant.

I am willing to voice a minority or unpopular opinion & do so in a constructive way.

When I voice disagreement I do it in a way that enhances the discussion.

I am an active listener.

I don't retreat when there is conflict.

Self Awareness of how

Usually

Sometimes

Rarely

I might inhibit the process

I am cautious about a tendency to dominate the conversation.

I am aware of my impatience and
try to sit back more.

I am aware of being judgmental and
try to be more open to other opinions
and points of view.

I am aware of my position of power
or influence and try not to overwhelm
the discussion.

Pre- meeting behavior

I prepare in advance for meetings.

I complete tasks needed for the meeting.

I voice concerns/opinions about the meeting agenda in advance.

What else have you noticed about yourself that's not listed?

Are there areas you are especially strong in?

Areas that need improvement and/or that you'd like feedback on?

GROUND RULES/ NORMS FOR GROUPS

In order for groups to work effectively at making decisions, setting goals and developing plans, they need ground rules (also referred to as group norms or commitments). Most ground rules/norms/ commitments are based on two values:

Valid information: The group has the relevant information that it needs to set goals and make decisions. Such information should not only include facts and dates, but also a good sense of where individual group members are coming from in terms of their thoughts and beliefs.

Internal commitment: Each member feels personally responsible for the group's decisions. Everyone is committed to helping implement the decisions because everyone believes in them-- not because of rewards or penalties.

Possible Ground Rules/ Norms:

- ***Share all relevant information:*** This includes information that may not support your position and sharing feelings and concerns-- even if doing so may lead to discussions that are difficult or that others want to avoid.
- ***Focus on interests, not positions:*** Discussing solutions first can back people into positions that they feel they have to defend. Each group member should identify their interests before talking about specific positions. What could look like a disagreement when talking about solutions first may appear quite different when the same problem is approached from interests.
- ***Be specific and use examples:*** Use directly observable behaviors to describe people, places, things and events. Such examples generate valid information and enable group members to determine independently whether the data is reliable. Clarify an issue or position by sharing an example with the group. This often avoids many potential disagreements. It is also helpful to agree on the meaning of important words. For example, the group may be discussing how Board members should recruit new leaders—does “recruit” mean making a phone call, talking one-on-one or leaving a leaflet on someone's chair?
- ***Make statements and invite questions and comments:*** Express your point of view, explain your reasons and then ask others to respond with whether they agree or disagree and why. Don't assume that silence means agreement or disagreement.

- ***Keep discussions focused:*** Group members should discuss relevant issues, focus on the same issues and fully understand the issues. It is also essential to clearly define and redefine what the decision is that has to be made by the group. In depth discussions can often lead a group to forget their focus and lose sight of the decisions that they have to make.
- ***Eliminate cheap shots and other distractions:*** People shouldn't engage in any behavior that distracts the group from its task. This includes cheap shots, side conversations, and private jokes.
- ***Be honest and forthcoming:*** There will be many times in which the group has to discuss "hot" issues. This is the time to have open disagreement and honest discussions within the group. Disagreement should be done with respect. Respect means that group members should not refuse to discuss "hot" issues at the Board meetings and then proceed to discuss them with outside groups or cliques. This is disrespectful and will damage the group's ability to make effective decisions.
- ***All group members are expected to participate:*** The work of the board continues between board meetings. Helping to make decisions, but not implement them weakens the board. Perfect attendance is not necessarily an indicator of full participation. Taking the time to read materials on an issue; working with local committees; and following through on assigned tasks are signs of real participation.
- ***Maintaining communications with and involvement of the members:*** Boards cannot and do not operate in isolation from local union membership. For the membership to have the same organizational commitment, they must have relevant information. The members are key to obtaining any goals laid out by the Board. Communication and involvement is a two way street.
- ***Consider making decisions by consensus:*** Consensus is at the heart of ground rules and group norms. Everyone should agree with and support the group's decision. Many groups have systems for voting when they can't reach consensus, but voting is not the first decision-making method that they use. It is critical for the group to take full ownership for the decisions that are made.

WORKING WITH COMMITTEES

A committee is a group which is delegated to perform a function or a task. They can be established by election, appointment or made up of volunteers. Committees exist in many local unions. In fact, some local unions' constitutions provide for specific standing committees and make provisions for the formation of others. Further, the constitution of some local unions designates the local leader as an ex-officio member of all committees and/or charges the local leader with the responsibility for appointing committee members.

The formation of committees allows for the pooling of different ideas, experiences, and talent to set goals and to develop and implement a campaign/action. This blending of ideas, values and perspectives facilitates better solutions and courses of action. In addition, the formation of committees and sub-committees promotes membership involvement in campaigns/actions and also frees up the local leader for other tasks. Apart from providing staff and members with valuable learning experiences, committees ideally will provide the E-Board with people who can help to determine how to best achieve the union's goals.

Committees are very useful when there is a need to tackle a specific problem or project quickly. For example, the appointment of a committee to examine and report back on an issue will help the E-Board to make a decision. Committees are also useful when there is a need to avoid or end lengthy and unfruitful discussions or when it is impractical to have the entire group participate in such a discussion. For instance, some local unions, after receiving members' views, establish bargaining committees to work out the specific contract language and/or to negotiate or renegotiate the contract. In practice these bargaining committees have proved to be more effective and efficient rather than the alternative: a prolonged discussion at a membership meeting on contract wording, number of proposals, and so on.

Here are some things you need to be mindful of when you are about to form committees and/or work with committees:

Diverging Interests and Priorities: People come from different backgrounds, cultures and bring varied experiences to a group. Since people join groups for different reasons, their interests and goals will diverge and there will be instances when they will prioritize issues differently.

Past History/Developments: Know the history of your local union in terms of how it promotes and utilizes the recommendations of committees. People will be interested in serving on committees and will participate in committees' activities when they know that their local union acts on their committees' recommendations.

Exclusion of a Group or Leader of a Group: Committees should be representative of the local union's membership. Further, given that the labor movement is about inclusiveness and representation, committees should reflect the specific groups that could be impacted by the committees' actions. This includes race, ethnicity, gender, sexual orientation, age, etc.

Isms: Issues of sexism, racism, homophobia, and so on sometimes surface and negatively impact the work of committees. Ignoring these issues will not make them disappear. Try to find out what's fueling the institutional and/or interpersonal discrimination and approach the issue in a way that involves everyone and does not rely on individuals from the oppressed group to "prove" their case. Remind other board members that it's in everyone's interests to take on these issues and enlist the services of outside facilitators as needed.

Communications: Effective communications advance the work of committees. Make sure that members of the committee understand the mission and goals of the committee and the time frame that the committee is working within.

Self-Interest: Sometimes a few people serve on committees to promote their self-interest. Make it clear to all committee members that the committee is about advancing the goals of the union.

Here are some things you can do to promote effective committees in your local:

- ❖ Make sure the committee members clearly understand their role and responsibilities as well as how they connect to the E-Board.
- ❖ Keep committee records, particularly minutes and decisions made; note assignments and maintain an ongoing list of members with up-to-date e-mail addresses and phone numbers.
- ❖ Involve even the newest members in developing campaigns/actions and in the decision-making process. A greater level of ownership will promote stronger commitment.
- ❖ Provide orientation and training for new committee members that helps them to understand what is expected of them, allows them to discuss "isms" and other difficult topics and provides them with opportunities to get to know one another better and build their identity as a group.
- ❖ Do things at meetings. For example, review past work; make decisions; plan new programs. Remember that people tend to keep attending meetings when they have accomplished something and tend to be more committed to issues that have been agreed to in the group.
- ❖ Hold committee meetings at a convenient time and location for those attending, keeping child care and other issues that may impair participation in mind.
- ❖ Keep the committee accountable. Accountability will help to keep the committee on track and will help the committee members to feel that their work is taken seriously. Ensure that a brief committee report is provided to the E-Board regularly.

GOAL-SETTING CRITERIA

- 1.) State the goal as specifically as possible.
- 2.) If you're trying to change individual behavior, performance-oriented goals are more useful.
- 3.) Goals must be attainable or they will create frustration.
- 4.) Goals represent hopes-- people want to observe results.
- 5.) Goals must be clear and acceptable to those who are affected by them and such people should be included in the goal setting process.
- 6.) Because you can't always determine clear, acceptable and attainable goals in advance, you must be able and willing to modify your goals.

ROAD MAP TO MEETINGS THAT GET THE WORK DONE

Before the meeting:

- ___ set goals (goals for meeting outcomes/your goals as a meeting organizer)
- ___ revise goals
- ___ gather information
- ___ recruit for the meeting
- ___ develop an agenda
- ___ delegate meeting tasks
- ___ prepare yourself and other people
- ___ deal with physical set-up and logistics

Leading the meeting:

- ___ open the meeting
- ___ review and/or modify meeting goals
- ___ review and/or modify meeting agenda
- ___ create and/or review ground rules/ group norms
- ___ move the discussion
- ___ remind participants about their decisions
- ___ encourage participation
- ___ re-state decisions made
- ___ help kept the group focused on the agenda
- ___ end up with next steps, a timeline and assignments
- ___ facilitate a group evaluation of the meeting

After the meeting:

- _____ evaluate the meeting as a meeting organizer
- _____ follow-up on assignments
- _____ tell people not present at meeting what happened
- _____ thank people who helped with particular aspects of the meeting

G. A. T. E. S. TO AN EFFECTIVE MEETING

G Goal – Set a goal for each meeting. Ask yourself: “What am I trying to achieve by holding the meeting?” G is also for ground rules – these can help a meeting by setting the stage with principles of mutual respect, equal opportunity to speak, etc...

A Action – The meeting should help to build union participation by involving members and by creating a plan. Try to end each meeting with a list of actions to take before the next meeting.

T Time – Build in time for each piece of the agenda and try to stick to these during the meeting. Whenever possible, do not run over the allotted time for the meeting.

E Efficient – Once the goals of the meeting are accomplished, members can leave if they need to get back to work or home. Some may wish to stay in order to discuss other matters, but more members will attend if the meetings do not drag on and are perceived as having structure and purpose.

S Share – Try to rotate who chairs the meetings and work to insure that everyone has the opportunity to state their opinions and ideas on important issues.

STEPS TO FACILITATING A DISCUSSION

◆ Preparation

Know what the goals are

Know who the audience is

Prepare questions

◆ During the discussion

Have each person introduce themselves (names as well as other relevant information)

Briefly describe your role as a facilitator

Clarify the goal(s) for the discussion (including input from the group)

Have the group choose a recorder and, if small groups break off, people to report back

Establish ground rules/ group norms as needed

Use prepared questions to keep discussion focused

Encourage active participation of the whole group

Remind participants of time limits

Help group summarize decisions and map out action steps following the discussion