

Local Union Executive Board Workshop Guide

(based on the SEIU Education Department's guide)

EXECUTIVE BOARD WORKSHOP GUIDE

Notes to Trainers

The workshops contained in this guide can be utilized in entirety as a comprehensive training program or as individual modules. The workshop times are approximate and some of the sections have more than one exercise to choose from. Selecting from these and deciding how much time to allot will vary depending on the scope of the training's objectives, and the size and experience level of the participants.

The following workshops are included:

- 1. Developing and Using Local Union Mission Statements (2-3 hours)**
 - Purpose of Mission Statements
 - Personal and Labor Movement Values & Beliefs
 - Mission Statements and Goals
 - Local Union Mission Statements
 - Turning Goals into a Program

- 2. Clarifying Roles & Responsibilities Within our Union (2-3 hours)**
 - Common Challenges and Pitfalls of Executive Boards
 - The Role of the Executive Board
 - Whose Job Is It? (Executive Board, Officers, Staff)

- 3. Building Group Decision Making Skills (2-3 hours)**
 - Making Decisions as a Group
 - Consensus Versus Majority Vote
 - Ground Rules as a Tool

- 4. Working with Committees (2-3 hours)**
 - Role of the Committee Chair
 - Committee Goals and Tasks
 - Committee Recruitment

- 5. Organizing Productive Meetings (2-3 hours)**
 - Meeting Preparation
 - Road Map to Meetings That Get Things Done
 - Resources Needed for Running Productive Meetings

As an Executive Board trainer, you should always conduct a needs assessment with appropriate Local union leaders before implementing the training. This will enable you to:

- 1) Identify and understand the group
- 2) Identify any internal political issues that may exist
- 3) Identify potential obstacles or pitfalls
- 4) Select essential training components and appropriate resource materials

See the handout “Executive Board Training: Assessment Questions” for specific assessment questions. You may wish to send these questions to the leader(s) before meeting with them.

Scenarios & Exercises

There are several exercises that might need to be tailored to the local. Terms, leadership structures, role of officers, etc. can vary from local to local. It’s crucial that you read through the hand-outs and exercises and make the appropriate changes.

This is particularly true of the scenarios used in the workshops. When meeting to discuss the training with local leaders, explain that it would be most useful to present scenarios that are realistic to the E-Board members. The scenarios should somehow relate to confusion/ lack of clarity around the roles of E-Board members, officers and staff. Discuss this issue and try to collaboratively develop an outline for the scenarios.

Also, during the portion of the training focused on group decision making skills, it would be helpful to have some sense of actual decisions that the Board will be grappling with in the near future.

Executive Board Binders

We suggest that prior to the training you work with the local to create a binder for the Board members. This will cut down on the confusion of constantly passing out hand-outs and serve as an ongoing resource at the Local.

What’s Not in the Training: Strategic Planning

Strategic planning is not included in this Workshop Guide. However, it is mentioned in the assessment handout. Since strategic planning can often be helpful, local union leaders should be encouraged to schedule future strategic planning sessions if appropriate.

WORKSHOP 1: DEVELOPING & USING LOCAL UNION MISSION STATEMENTS

Length of Workshop: 2.5 to 3.5 hours

Workshop objectives: At the end of the workshop, participants will

- Be familiar with the Local union Mission Statement, Preamble and/or Principles.
- Have made the connection between the Local's Mission Statement and the Local's long term goals (and begun to identify what is needed to carry out those goals).

Preparation for this section

Before leading this workshop:

- A. Identify whether the Local has its own Mission Statement. If so, obtain a copy.
- B. Post the questions for the small group discussion on mission statements and goals (#4).

Materials used in this section

- Values and Beliefs Exercise
- International and/or Local's Mission Statement

WORKSHOP 1 GUIDELINE:

1. Welcome. Introductions. Overview of Agenda.

30 minutes

The Local union president should welcome the Board to the training and introduce the staff leading the training. There are various icebreaker questions that can be used to accompany participant introductions. Some examples are:

- What is the story of your name (or of someone in your family)?
- Describe one strength that you bring to the Executive Board.
- What excites you most about being an Executive Board member?
- What do you think is the biggest challenge about being on the Executive Board?

There are other questions which are less optional, as they relate more directly to the training. These include:

- How/ why did you become involved with the union?
- Are there other aspects of your life where you've been very active and/or a "leader"? How do you think these experiences will be useful in your role as an Executive Board member in the union?
- What do you hope to get out of this training?

Following the introductions, give an overview of the agenda, the day's schedule and answer questions. Review any logistical issues and ask the group to briefly set some ground rules/ group norms for the course of the workshop. Chart and post these.

2. Purpose of Mission Statements.

5 minutes

(Note: The time spent utilizing the documents in this workshop will vary depending on the Board's level of experience and familiarity with the documents.)

Intro:

"As leaders of the union, you need to have a long term vision of what your Local can accomplish and what your Local's role in the larger labor movement is. As leaders you also need to be able to communicate and to organize members around that vision."

"Before we get into the nuts and bolts of what it means to be a board member, we want to talk a little about that vision. This discussion will also bring out issues that need to be covered in more depth in a future strategic planning session."

Ask the group why they think that organizations develop Mission Statements and chart participants' answers. Possible responses include:

- (a) they help to define the values and principles of an organization
- (b) they provide guidelines for how an organization sets goals and makes choices.

3. Values & Beliefs Exercise

45 minutes

30 minutes: Ask participants to complete the first two questions on the “Values and Beliefs” hand-out individually and when finished to share their answers in a small group with 3 to 4 other participants.

15 minutes: Following this, ask the pairs to complete the last question together and to share their answers with the larger group.

4. Small Group Discussion on Mission Statements & Goals 30 minutes

(Note: If the local doesn't yet have a mission statement, it is possible to attain others online (from other local's sites). You can also use this section from the International Union's constitution:

“This International Union is created in order to elevate the social and economic status of workers and, further, to advance the principles and practice of freedom and democracy for all.”

The decision to use the International's constitution, the Local's Mission Statement and/or other local's mission statements will also depend on how well developed they are.

The goal of this discussion is to have participants look at the labor movement's overall mission.

Review the Mission Statement with the whole group, answering any questions (and encouraging them to answer each other's questions). Then in the same small groups, have participants answer the following:

- What are the key values expressed in the Mission Statement?
- How are your values and beliefs reflected in the Mission Statement?
- What are issues and/or campaigns that the local has been involved in that reflect these values?
- How can these values help guide the decisions of the Executive Board?

Report Back: Ask each group to report out on one of the questions. Ask other groups to add anything different.

5. Local Mission Statement

15 minutes

If the Local's Mission Statement was not used, have the Local leader read it and pass out copies and have a brief discussion about how it fits in with the International's Constitution.

6. Turning Goals into a Program

20 minutes

- 1) On another flip chart post the Local's program goals. Ask a Local leader to provide a quick overview of their goals/programs.
- 2) Pose the following questions to the group for feedback and discussion:
 - *How are your Mission Statement and/or long-term goals reflected in your activities?*
 - *As an Executive Board, what steps can be taken to ensure that your Local's mission statement/goals become a reality?*
 - *What will it take to carry out this plan?*

7. Wrap-Up:

Tie together the workshop components by highlighting the following points:

- *A Local's Mission Statement serves as a foundation of principles guiding the Local in the development of goals, planning and implementation.*
- *While an awareness of our personal perceptions and individual values is important, as leaders we must try to share a common set of values and beliefs that make us part of a larger union movement.*
- *Local leaders must develop goals and plans that are based on a common set of Union principles that also reflect the Local union's mission.*
- *Local leaders must be able to communicate the vision behind the union's Mission Statement and program to the membership.*

WORKSHOP 2: CLARIFYING ROLES & RESPONSIBILITIES WITHIN OUR UNION

Length of Workshop: 2.5 to 3 hours

Workshop objectives: At the end of the workshop, participants will

- See themselves as leaders and appreciate different leadership qualities.
- Understand the importance of clearly defined roles and responsibilities for E-Board members, officers and union Staff.
- Have identified current E-Board pitfalls and explore solutions to ensure a cohesive and functioning E-Board.
- Have identified and developed ideal roles for local union E-Board members.
- Have practiced developing and communicating our union's message to various audiences (in a manner consistent with appropriate E-Board roles and responsibilities).

Preparation for this section

Before leading this workshop:

- A. Identify whether the Local has any current job descriptions or written roles for Officers, E-Board members and/or the Executive Director. Obtain copies of each.
- B. Chart the main points in the hand-out, "Qualities of Leadership".
- C. Chart the items listed on the "Common Challenges and Pitfalls of Executive Boards" hand-out for use in the Responsible Board exercise (#2).

- D. Chart the duties listed on the “Whose Job Is It?” hand-out used in the small group discussion (#4).
- E. Post the questions for the discussion following the scenarios (#5).
- F. Talk with the people at the local about the scenarios/ re-write them as needed (#5).

Materials used in this section

- Qualities of Leadership
- Duties of the Executive Board
- Common Challenges and Pitfalls of Executive Boards
- Board/Staff Roles
- Whose Job Is It?
- Executive Board Scenarios: Approaches & Responses (and/or other scenarios designed to more closely fit the Local’s issues)

WORKSHOP 2 GUIDELINE:

1. Introduction

25 minutes

To introduce this workshop, ask the group to think of leaders who they respect and admire. Ask them to brainstorm the qualities that these leaders possess. Chart their responses and compare to main points of “Qualities of Leadership” and what they said about themselves as leaders in the previous workshop. Conclude with:

As an Executive Board member, everyone here is a leader and will be seen as such by others within and outside of our union. Developing your leadership qualities is an on-going process—hopefully one which is supported by your participation on the Executive Board.

Next, ask the group to brainstorm a list of the most important tasks and responsibilities of an ideal Executive Board. Chart their responses to the question. Discuss how these tasks fit or don’t fit the qualities of leadership just discussed.

Possible discussion questions:

- Are these the tasks that really build the local’s program?

- Do they develop other leaders?
- Are these tasks better for the leaders to do versus the staff?
- Are these responsibilities they're personally interested in?

Refer them to the hand-out, "Duties of the Executive Board" and briefly review and discuss.

2. Responsible Board Exercise

30 minutes

- A. Pre- flip chart the pitfalls listed on the "Common Challenges..." check-list. Ask if something is missing from the checklist and add it to the flip chart.
- B. Ask each participant to complete the checklist on their own. (If they're new to the union's Executive Board, they can draw on experience from other leadership bodies they may have been a member of.)
- C. Go through the list and ask for a show of hands as to how many of the participants checked off each pitfall, recording this on the flip chart. Discuss the pitfalls that most people agreed to and why. If there is time, discuss the pitfalls that only a couple of people have identified and why (this may help to flush out divisions within the group and bring everyone to a common understanding).
- D. Ask what effect these pitfalls have on the ability of the E-Board to function effectively/ cohesively and chart the responses.
- E. In wrapping up this section, point out that E-Board pitfalls generally fall into three categories:
 - Confusion about roles and responsibilities.
 - Lack of (or poor) discussion and decision-making processes.
 - Lack of established or functioning committees.

Conclude with: *The first thing we're going to talk about are roles and responsibilities.*

3. The Role of the Executive Board vs. Role of the Staff

30 minutes

We talked about the role of the Executive Board. We're going to spend more time on what the role of the Board is versus the role of fulltime officers and staff.

Refer group to the Board/Full Time Officers/Staff Roles hand-out and ask:

- *How are the tasks broken down in these two columns?*
- *What does this division indicate about the role of the Board vs. the role of the full time officers/staff?*
- *Why do distinctions between Board and staff roles exist? (e.g. everyone helps to develop and implement the Local's plan, but in different ways. To a greater extent, the Board is responsible for developing strategy. While the Board is also responsible for implementing the strategy, the staff does so on a day to day basis.)*
- *What are some of the problems that these distinctions are trying to overcome? (e.g. gridlock—things not getting done because roles are unclear; people focussing on work that's not theirs versus work that is; board members becoming involved unnecessarily in staff issues)*

Discuss elements of the hand-out that are of interest to the participants.

4. *Small Group Discussion: Whose Job Is It?* 30 minutes

Now we're going to do an exercise around board and fulltime officers/staff roles.

- A. Refer to the chart with the duties listed on the "Whose Job Is It?" hand-out.
- B. In small groups, ask the participants to complete the hand-out.
- C. After everyone has finished, ask a representative from each group to place sticky dots under the pre-posted headings of E-Board, President or Director.
- D. Explore contradictions and differences of opinions and try to move the group towards consensus on as many of the roles as possible.

5. *Case Studies & Discussion* 60 minutes

Next, we're going to divide into small groups and discuss some scenarios.

[Scenarios are included for use as case study exercises. Whenever possible, however, information provided during the pre-training assessment should be used to create scenarios that are relevant to the E-Board and reflect the Local's membership.]

Small group discussion: 30 minutes

- A. Divide participants into small groups. Give each group 1-3 scenarios to work with.
- B. Ask each group to come up with responses to the scenarios given.
- C. Ask each group to report back on their responses to the scenarios assigned.

Report out and discussion: 30 minutes:

Pre- flip chart the following questions and ask them after each group has reported out:

- What did they think of the group's response? Would they have done anything differently?
- What underlying issues did these scenarios raise?
- What "lessons" or ground rules can be drawn from these examples on the role of Executive Board members?

5. Wrap-Up:

The following points should be highlighted as a wrap up to this workshop:

- E-Boards must recognize their common pitfalls and make efforts to avoid these problems.
- It is critical to have clearly defined roles and responsibilities in order for an E-Board to function effectively and to carry out Local plans.
- It is important for E-Board members to approach problems and issues in a manner that is consistent with their defined roles and responsibilities, moves the union's program and helps to maintain unity within our union.
- Executive Board members are key leaders of our union. They must be guided by a bigger vision when they approach problems or are challenged. This means acting pro-actively and thinking of the organization as a whole.

Workshop 3: BUILDING GROUP DECISION-MAKING SKILLS

Length of Workshop: 3 – 4 hours

Workshop objectives: At the end of the workshop, participants will

- Have identified ways in which to encourage broader participation on the E-Board.
- Have an understanding of how a consensus approach can be used to make better decisions.
- Recognize how group norms/ commitments can be used as a tool for fostering greater participation during group decision-making.
- Have established a set of group norms/ commitments for immediate use.
- Be familiar with the individual responsibilities that each E-Board member has in contributing to effective group decision making.

Preparation for this section

Before leading this workshop:

- A. Identify whether the E-Board currently uses any ground rules/ group norms. If so, obtain a copy.
- B. Post the grid for the “Ten Heads Are Better Than One” exercise (#3).
- C. Post the definition of Consensus Decision Making from the hand out.
- D. Discuss the question to be used for the “Group Decision Making” exercise (#5) with the leaders at the local.

Materials used in this section

- Working Styles
- Working Styles “Discussion Sheet”
- Phrases for Miscommunication

- Phrases for Active Listening
- Ten Heads Are Better Than One
- Responsibilities in Consensus Decision Making
- Consensus Decision Making
- Self Analysis: What is Your Level of Positive Participation in Meetings?
- Ground Rules/ Norms for Groups
- Role of the Observer

References:

- The Common Challenges and Pitfalls of Executive Boards
Exercise from Workshop # 2
- Ground rules established at the beginning of the training

WORKSHOP 3 GUIDELINE:

1. Participatory Group Decision Making

15 minutes

In the past, when you've been a part of groups that have been effective at making decisions, what do you think enabled the group to do this?

Chart responses from group. If not mentioned, add:

- Everyone was working toward a common goal.
- People really focused on what the decision was about.
- Group members respected and trusted one another.
- Leaders of the group kept the meetings moving along.
- Everyone had enough information.
- People felt that the decision mattered.
- Everyone participated and felt that their opinion counted.

Stress how critical it is to have all of these elements present in order to have a successful meeting. Ask for and/or give examples of what can happen when only some of the elements are present:

- Although the chair of the meeting ran a “tight ship”, there was little or no participation by others.

- On the opposite spectrum, there was a lot of participation, but no decisions were made because of a lack of structure.

Briefly discuss different leadership and personality styles:

- *Different personalities will be working together on your Executive Board. It's important to recognize the ways in which people's personality traits complement as well as contradict each other.*
- *Some leaders are very "take charge" and rarely delegate tasks or responsibilities. Such people often find themselves unable to get more people to participate and/or feel so overwhelmed that they can't get anything done.*
- *Other leaders are more participatory but do not work within any structured settings and guidelines. This may lead to frustrations because decisions are not made, meetings appear chaotic and plans are not implemented.*

2. Working Styles Exercise

30 minutes

We're going to do a fun exercise designed to illuminate our personal working styles and give us some insight on how to better function as a committee together.

Refer group to the "Working Styles Exercise" hand-out.

15 minutes:

- A. Review the information at the top of the page regarding the purpose of the exercise.
- B. Give the participants ten minutes to individually complete the worksheet by rating each question from 1-4. (Directions are on the top of the sheet).

15 minutes:

C. Discuss the following questions (everyone together or in small groups—if in small groups, distribute the "Discussion Questions" handouts which lists these):

- *What are the strengths your working style brings to this group?*
- *How can your working style sometimes hinder the work of this group?*
- *Which working style do you relate best to? Which style are you most comfortable with?*
- *Which working style do you tend to clash with?*
- *What are some ground rules that we can establish that recognize the strengths and weaknesses of our various working styles?*

D. Distribute and briefly review the “Miscommunication Phrases” and “Phrases for Active Listening” handouts.

3. Introduction to Consensus Decision Making “Ten Heads Are Better Than One” Exercise

15 minutes

One of the most important and difficult things for groups is to make decisions. We’re going to do a quick exercise to illustrate one decision making tool.

Refer group to the “Ten Heads Are Better than One” exercise:

- Post the chart with the grid.
- Ask participants to count the squares, writing down what they think the total number is. Give the group one minute to do this.
- Ask if anyone came up with less than 16. Then, starting with 16, take a vote for each number up to 30 and record the results on a flip chart. (Don’t let people change the answers that they originally wrote down.) Point out which number of squares received the highest vote.
- Beginning with 17 and going all the way up to 30, ask for volunteers to describe how they arrived at that answer. Ask the group: *Do you see how s/he got this number?* As it gets more complicated, ask the volunteers to come up to the flip chart and show how they arrived at their answer.
- At 30, point out that if the group had stayed with the original answer that the majority had voted for it would have been the “wrong” answer.

Discussion Points

Trace the steps of how the entire group arrived at the right answer:

- Each member formed their own opinion and was asked to express it.
- When they expressed their opinion, there was no argument, just listening and a recording of the answer.
- After everyone had spoken, people described how and why they arrived at the answer they did. Everyone had to understand how that answer was arrived at and to see other points of view.
- The group finally arrived at an answer that they agreed with – one that they could all live with.

It may also be useful to point out to the group how eagerly people solicit information from others during this exercise. People want to know how and why others arrived at a different answer. Explain that such curiosity could serve the group even more so with regard to non-neutral issues.

Imagine what you could accomplish by using the same manner approach when more challenging and important issues are at stake.

4. The Use of Consensus in Decision Making

20 minutes

Have description of “Consensus Decision Making” posted and briefly discuss.

Ask the participants to describe any experiences they’ve had with consensus decision making. *When did it work to use consensus? Why did you use it? What are some of the pitfalls? What are some of the elements that need to be in place in order for consensus to work? (e.g. a shared commitment to the process, everyone participating, clarity around what is being decided)*

Additional points:

- Consensus does not necessarily mean that everyone agrees with the decision; it means that everyone feels they have been heard and that they support the decision.
- Consensus can be an effective tool for flushing out “hot” issues.
- Consensus helps to validate everyone’s concerns while reaching a decision through complete discussion, healthy debate and a firm resolution.
- Consensus should not be used to procrastinate on making a decision.
- The group should decide in advance how and why they will move to voting if they can’t reach consensus and the decision can’t be postponed.

Distribute the “Responsibilities in Consensus Decision Making” and “Consensus Decision Making” handouts and discuss any points not already raised.

5. Group Decision-Making Exercise

60 minutes

We’re going to practice effective meeting and decision making skills. Before we do a group exercise, we’re going to think about our own level of positive participation in meetings. Fill out the “Self Assessment” in your binder honestly – no one but you is going to see it!

- A. After participants complete the self assessment on their own, divide them into groups of about 8 each. Ask each group to choose a facilitator and an observer. Refer the observer to the “Role of the Observer” handout.
- B. Give participants a question based on a real decision coming up soon for the E-Board. (Discuss a possible question to use with the Local’s President during the initial needs assessment). Example questions:
- Should the Board take a stand on a local or state referendum (changing the way the City Council is elected, etc)?
 - Should the Board make participating in a local campaign supporting immigrant rights a priority?
 - Should the local support the local hand-gun ordinance? (Or some other controversial issue.)
 - What will be the 2 most important factors in winning a strong contract during upcoming bargaining?
 - What are the two main factors that should be considered when deciding whether to strike?
- C. Give each group 25-30 minutes to reach consensus on the question. Give the groups about 15 minutes to discuss how they think the discussion went and to get feedback from the observer.

D. Large group discussion.

15 minutes

Possible discussion questions:

- *What was the group’s final decision? Does everyone agree that that was the final decision?*
- *What was the process of decision-making? How did the group arrive at its decision? Did you immediately talk as a group? Did individuals come*

up with their own priorities first? Did the group vote, employ consensus (meaning waiting for everyone to arrive at the same decision) or both?

- *How did the group deal with conflict? Were there disagreements? If so, how did the group deal with these? How do the people who held the minority opinion feel? Was it really a group decision or did some people just abstain from the decision? How did the decision-making process help or hinder dealing with conflict?*
- *What was the group process like? How did the group work together? Did everyone participate? Did someone chair the discussion? If so, how was the chair selected?*

5. Using Group Norms/ Commitments to Reach Decisions 35 minutes

10 minutes:

A. Referring to the ground rules generated by the group earlier in the day, ask whether anyone has used ground rules/ group norms or commitments before in other meetings. If so, ask them to elaborate on how they were used and why. Ask them whether they've experienced ground rules that went deeper than those arrived at quickly during the beginning of the training. Ask:

- *What are things that you could do to insure full participation in meetings?* (post responses)
- *How could group norms/ commitments help with some of the pitfalls we talked about earlier?* (post responses)

10 minutes:

B. Divide the participants into 3 small groups to brainstorm a list of group norms/ commitments for use before (group 1), during (group 2) and after (group 3) meetings that would help them tackle challenges and lead to more constructive group interactions. Ask each group to chart and post their ideas.

15 minutes:

C. Ask each group to report out on what they came up with, and ask the other groups contribute additional ideas. Explain that the goal is to develop a list of ground rules that the Executive Board can use.

D. Distribute the “Ground Rules/ Group Norms for Groups” handout and discuss any points not already discussed.

6. *Ensuring the Success of Group Norms/ Commitments* 20 minutes

A. Ask each participant to take five minutes to list what personal behaviors they might need to change in order to ensure the success of these ground rules. Solicit report backs from as many participants as time permits, drawing out commonalities. (Ask people to reflect on their “Self Analysis” questionnaire.)

B. Wrap-up by reviewing the list of agreed upon ground rules and making suggestions of when they might implement them. Discuss how these ground rules could also be used with other groups and committees within the union.

6. *Wrap-Up*

The following points should be highlighted as a wrap up to this workshop:

- E-Board members must recognize that different personalities and leadership styles exist.
- Finding a way to focus on how these varying styles complement each will help to get things accomplished.
- Although making decisions as a group can be challenging, the key is to identify appropriate structures and guidelines that allow the group to make effective decisions.
- Consensus can be used as a tool to guide the group through hard issues by creating an environment in which everyone feels free to express and solicit opinions from one another.

WORKSHOP 4: WORKING WITH COMMITTEES

Length of Workshop: 2.5 hours

Workshop objectives: At the end of this workshop, participants will

- Be able to connect the functions and responsibilities of various committees with the overall goals of the Local.
- Understand the roles and responsibilities involved in leading committees.
- Have set specific goals for their committees.
- Have identified ways to recruit activists on to committees and practiced effective communication skills.

Preparation for this section

Before leading this workshop:

- A. Identify whether the Local has committees already in place, and if so, get copies of their guidelines, goals and structures.
- B. Pre-post any of the goals for the committees.

Materials needed for this section

- Working with Committees
- Goal- Setting Criteria
- Effective One-to-One Communication
- Three Steps in Active Listening
- Understanding Why People Volunteer

WORKSHOP 4 GUIDELINE:

1. Introduction

20 minutes

Begin this workshop by asking the following questions:

- *What are the key characteristics of effective committees?* (e.g. moves the Local's program, has clear responsibilities, is representative, produces results, open to new people, builds the Local, develops new leaders)
- *Why do Locals have committees?* (e.g. gets the work done more effectively, develops leadership, attracts activists)
- *What is the relationship of the committees to the E-Board?* (e.g. responsible for moving the larger plan, is accountable to the Board)

Ask the participants for examples of situations when they were on a committee that worked well and/ or a committee that did not. Tie points they raise to the questions above.

2. Role of the Committee Chair Discussion

10 minutes

Now let's spend a few minutes talking about the crucial role that you play as committee chairs.

Ask the group: What do you think are the most important aspects of a Committee Chair's role? If not mentioned, add (referring to the "Working with Committees" hand-out):

- Developing and working from a plan that moves the union's goals
- Recruiting representative committees
- Organizing productive and participatory meetings
- Ensuring that work gets done in between meetings
- Providing other Executive Board members with updates

The rest of this workshop focuses on setting committee goals and recruiting committee members. Following this, we'll look at how to organize productive meetings.

3. Committee Goals and Tasks

60 minutes

10 minutes: Introducing the Concept of Committee Goals

A. Refer participants to the "Goal Setting Criteria" hand-out and discuss.

B. Using a pre-posted list of the Local's goals and/or Mission Statement, explain that the group is going to be asked to develop goals and tasks for each committee that the Local has and/or wants to establish. Pick one committee to model how this will be done.

A sample goal for the Education Committee might be: *To assist in the development of a steward program that reaches the Local's goal of 1 steward for every 30 members and that provides ongoing training and support for stewards in both grievance handling and worksite organizing.*

C. Ask for feedback. Mention that the word "assist" is deliberate. (It is not just up to the Education Committee to run a stewards' program; it is also a responsibility of the staff). The "one steward for every 30 members" is specific and follows the Local's overall goals. The "grievance handling and worksite organizing" also helps to define the role of the steward.

15 minutes: In Small Groups Developing Goals

D. Distribute flip chart paper and markers and ask each group to develop a one or two sentence description of a goal for a committee.

F. Each group should post their responses and have someone ready to report back.

G. After each group has explained their goals, ask the rest of the participants for any modifications or additions (make sure that the groups' goals make sense before moving on to the next step).

10 minutes: Introducing the Topic of Committee Tasks

H. Using the Education Committee again as the example, present the following possible tasks to the group:

- *Chart five key work areas to identify where new stewards are needed.*
- *Identify and recruit new stewards in targeted areas within the next two months.*
- *Recruit both new and existing stewards to a stewards' orientation and training to be held in four months.*

H. Ask for feedback. Note that the tasks follow the "SMART" headings—Specific, Measurable, Action oriented, Realistic, Time oriented).

15 minutes: In Small Groups Developing Tasks

- I. Give each group some flip chart paper and markers and ask them to come up with 3-5 tasks their committee could accomplish within 6 months that would help move its goals. Each small group should post their responses and have someone ready to report out and explain them.
 - After each group has reported, ask the rest of the participants for any modifications or additions.
 - Make sure that the tasks make sense. Point out to the group that they have begun some of the steps involved in strategic planning.
 - Remind the group that it is important to regularly evaluate the Committee's goals and tasks.

While goals and tasks are not always completely set in stone, it's easier to recruit people to be on a committee that has a clear mission and vision. We're going to focus next on committee recruitment.

4. Committee Recruitment Discussion

15 minutes

Ask the group why members become active on committees and why someone would want to be on a committee. Ask for stories that illustrate different ways that people are recruited onto committees.

Chart responses, making sure that the following are covered:

- People want to be on committees that will produce results and create change.
- People appreciate opportunities to learn new skills and have new experiences.
- People want to be a part of things that are fun.
- People find it easier to be involved if it fits into their lifestyle.
- People usually do not like to be the sole representative of their cultural/ gender, etc. group.
- People are often motivated to help others as well as by self-interest.
- People almost always need to be asked.

Distribute the hand-out "Understanding Why People Volunteer" and discuss any points not already covered.

B. Ask the group to describe who they tend to recruit (people they already know, people they're most comfortable talking with, etc).

Recruitment should be based on where leaders are needed (shift, location, department, etc.) and who potential leaders might be--not who we're most comfortable with. Union staff often use charts to keep track of different potential leaders in various worksites. If you think this might be helpful for you as well, we can get you copies of these.

5. Committee Recruitment Exercise

45 minutes

Now we're going to practice different approaches to recruiting members onto committees. Being able to listen and communicate well is critical in terms of recruitment. What are some of the main points related to listening and communication that you think are important when recruiting others?

Chart the responses and distribute the "Three Steps in Active Listening" and "Effective One-on-One Communication" handouts. Discuss any points not already mentioned.

Break the participants into groups of three.

- A. Ask everyone to think of a person that is on the verge of activism-- someone who's been increasingly more involved or interested in the union.
- B. Ask the participants to tell the other members of their group about that person: their name, where s/he works, how long they've been a member, what involvement they've had in the union and characteristics that stand out about the person (e.g. assertive personality, not afraid of the boss, well respected by members, interested in politics)
- C. Staying in their small groups, have the participants role play their approach to recruiting the person they've described onto a particular committee (one of the other participants should play the person being approached, and the third should observe the interaction and give feedback). Each role-play should take 5-10 minutes.

D. Come back together as a full group and ask the participants what they learned from this exercise. Discuss the challenges that they foresee in terms of being more effective as recruiters. Chart a group-generated list of recruitment tips.

E. Distribute and discuss the “Involving Members in the Union at the Worksite” hand-out.

Wrap-Up:

This workshop has focused on the importance of committees in moving our union’s program and building our union. One of the key roles of Executive Board members is to chair or to be leaders on committees. Since meetings are one of the ways committee work gets done, the next workshop will focus on organizing and running productive meetings.

Workshop # 5: ORGANIZING PRODUCTIVE MEETINGS

Length of Workshop: 2 to 2.5 hours

Workshop objectives: At the end of the workshop, participants will

- Have identified basic principles for conducting productive meetings.
- Have practiced developing meeting goals and agendas (and created an agenda for use at a future meeting).
- Understand effective procedures that can help to structure meetings.

Preparation for this section

Before leading this workshop:

A. Identify whether the Local has developed any written guidelines for meetings (and/or whether agendas for different meetings held by the Local follow similar formats). Obtain copies of each.

Materials needed for this section

- The Facilitator's Role
- Steps to Facilitating a Discussion
- Roadmap to Meetings That Get the Work Done
- G.A.T.E.S. to an Effective Meeting

WORKSHOP 5 GUIDELINE:

1. Introduction

5 minutes

To introduce this workshop, ask the group for examples of meetings that they either run or take part in.

2. Good Meeting/Bad Meeting Discussion

30 minutes

A. Ask participants:

Who has been part of a particularly great meeting?

What was it about that meeting that made it a positive experience?

Chart their responses under the heading “Good Meetings”

B. Ask participants:

Who has been part of a particularly bad meeting?

What was it about that meeting that made it a negative experience?

Chart their responses under the heading “Bad Meetings”

C. Ask participants what the role of the facilitator/ leader was during these meetings. Discuss the difference between being a facilitator or leader who takes a passive role (concerned only with keeping the participants engaged in discussion, and not with the structure or agenda) and a facilitator or leader who follows a set agenda and moves the discussion (keeps it focused and moves the group toward action/ meeting their goals).

D. Distribute and discuss the “Facilitator’s Role” and “Steps to Facilitating a Discussion” handouts (explain that an additional training could be devoted to developing people’s facilitation skills).

3. Road Map to Meetings

90 minutes

30 minutes:

A. Introduce this section by asking the group for an example of a meeting that they will be in charge of that is coming up soon. Ask them what they think some of the goals of this meeting will be (chart the responses). Based on these goals, ask the group what they think should be included in the agenda for this meeting (chart responses). Ask them to keep the previous discussion about good and bad meetings in mind as they create this agenda.

B. Distribute the hand-out “Road Map to Meetings that Get the Work Done” and post/ review the points on the hand-out pertaining to meeting preparation, goal setting and forming agendas.

B. Divide the participants into small groups and ask each group to select an upcoming meeting that one of them has to plan.

C. Ask the person who will be planning this meeting to spend a few minutes giving the basic outline of what the meeting’s about (what they think the

goals are for the meeting, who they believe will attend, how long the meeting will be, etc.).

D. Ask each group to choose a facilitator (not the person whose meeting is being planned).

45 minutes:

E. Explain that the groups will spend the next 45 minutes developing an agenda for the meeting that they chose and listing what the committee chair would have to do in advance in order to prepare for the meeting. Upon completing the activity, each group should post their agendas and preparation lists.

20 minutes:

G. Coming back together, select some of the small groups to present their agendas and preparation lists (choose groups focused on different types of meetings).

H. Distribute the “G.A.T.E.S. to an Effective Meeting” and “How to Run a Union Meeting” handouts and discuss any points not already mentioned.

4. Wrap-Up:

Tie together the workshop components by highlighting the following points:

- *Productive meetings are a result of good preparation, structured agendas and clear/attainable goals.*
- *Meetings can be improved if there is a regular system in place to evaluate their effectiveness.*
- *When meetings are productive, the Executive Board will be able to help move programs in the Local.*