

WORKSHOP OUTLINES



UFCW STEWARDS IN ACTION!



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Legal Rights and Responsibilities of Union Stewards

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Union Power = Active Members

Organize!

Facilitator Notes

An important note about steward training...

- While there are specific learning goals for steward trainings, **the main objective is for stewards to leave feeling more empowered in their role as a leader in our union.** It's critical for steward training facilitators to keep this in mind at all times.
- Everyone who attends a steward training already has knowledge about our union and, often, about the role of a steward. They may not have previously participated in a steward training, but they've probably observed other stewards/active members at their current or previous job.
- In addition to this knowledge, the participants also bring lots of life experience relevant to their work as a steward.
- Education that empowers workers acknowledges and builds upon these experiences.
- In order for workers to feel like they can share their experience, they need to feel welcome and invited to participate. This requires the facilitator(s) to not only pause and ask questions, but to also address possible imbalances (in terms of who's speaking, language needs, etc) within the group.
- Union education is all about taking action. We are helping people to become better equipped to make real change at their workplace and in the community.
- Taking action requires planning, and whenever possible, each training should include some next steps/follow-up plans for what the stewards can do in the upcoming weeks and months.

Before the training...

- Prepare your materials in advance—handouts, flip charts, markers, food, name tags, sign-in sheets, A/V equipment, etc.
- Think about who will be participating. How many people? Are they newer members, or long-term activists? What issues are most likely important to them? Where do they work?
- Think about language needs at least two weeks prior to your training—and whether interpretation will be needed. You may also want to consider holding the training in languages other than English. Currently, the handouts for these training outlines are available in Spanish.

Given who the group is, decide how to best use the workshop outlines. You may decide to add an additional activity or to skip a certain section. If

everyone will have a shared employer, you may be able to use more specific examples from their contract and workplace.

- Create and time out your agenda, based on the group and what you hope to accomplish. The times listed in the workshop outlines are approximate. It's important to build in short breaks (10-15 mins) after each 1.5-2 hours of training. Depending on the energy of the group, you may want to build in additional breaks and/or 'energizers' (stand up and stretch, play a short game, etc.).
- Set up the room so that everyone can see each other and the flip-charts, screen, etc. If possible, try to avoid using a traditional classroom style for the chairs and/or tables.
- Hold the training in an accessible space for people who use wheelchairs and/or need other accommodations (try to find out what these are in advance).
- Try to have at least two flip charts set up in the training room. If you're working with a large group, you may want to project (versus flip-charting) some of the directions and other information.
- Various symbols will be used throughout the modules (see icons on page 4). For example, the Flipchart Icon highlights information intended for the flip charts/projection. Try to write out most of the flip charts in advance and leave a few blank pages between each for input from the participants.
- When writing on the flip charts, use different colored markers to help differentiate items.

At the beginning of the training...

A local union officer may begin the training by welcoming the stewards, or, you may begin the training as the facilitator. Either way, introduce yourself and briefly share why you're excited about the training and how steward education helps to strengthen our power. Explain that this training is designed to be interactive and to build upon the knowledge that's in the room. This means that the success of the training depends on everyone's participation and that you're looking forward to learning with and from everyone.

Ask the group to turn their cell phones off and indicate where the restrooms are located.

Distribute the UFCW Steward Handbooks. Explain that the training outlines and the Handbook work best when used together. In order to fully participate, encourage the group to hold off on reading it during the

workshop (other than when reviewing certain sections together).

Ask the participants to introduce themselves:

- Name
- Job (and workplace, if stewards are from different locations)
- How many years they've been a union member (if the group includes a mix of more and less experienced stewards you can change this question to be how long they've been a steward).

Add up the total years of experience reported and share this number, highlighting how much experience is in the room. Remind the group that the training is designed to utilize the knowledge that everyone brings.

Review the agenda (have it pre-charted and/or distribute copies of the agenda) and ask what questions people have.

Post a blank piece of flip chart paper on the wall and explain that you'll be keeping track of questions and ideas that come up that aren't directly related to the topic at hand, but are important nonetheless. This is called the "parking lot." Let the group know that you'll revisit the parking lot at the end of the training to decide how/when the items listed on the sheet will be addressed.

Explain that in addition to having our cell phones off, it's often useful to list additional 'ground rules' or 'group norms' — agreements we want to make in terms of what we need in order for the training to go well. Chart the responses (example: give other people a turn to talk if you've already spoken) and ask if everyone can agree to the list. Post it in a visible location for the duration of the training(s).

At the end of the training...

Thank everyone for participating. Refer back to the workshop goals reviewed at the beginning of the training (each section has its own goals). Ask the group if they think the workshop met these goals and what they found most useful. Ask what they think could be improved. Solicit specific suggestions.

Module Icon Key



Flip Chart



Ideas



In Handbook



Worksheet/
Handout

NOTES

THE ROLE OF A UNION STEWARD

Total Time—2 hours

Learning Goals

- Discuss the challenges and rewards of being a union steward.
- Consider the steward's role in building union power.
- Learn more about the role of the steward in all aspects of our union's work.

Sections—Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. Challenges and Rewards of Being a Union Steward—10 minutes
- III. Stewards are the Link—10 minutes
- IV. Ella's Song—10 minutes
- V. The Steward's Role in the "Union Triangle"—10 minutes
- VI. The Role of Union Stewards: Scenarios—30 minutes
- VII. The Day-to-Day Work of Stewards—20 minutes
- VIII. The Steward's Role in Building Solidarity—15 minutes
- IX. Skills and Tools Stewards Need—10 minutes

Materials Needed

Flip Chart, Markers, Tape
Copies of the Steward Handbook

Handouts/Worksheets

Ella Baker Bio and Ella's Song Handout
What is the Steward's Role? Worksheet

NOTES**I. Goals for the Training—5 mins**

Post and review the goals for the training:

- Discuss the challenges and rewards of being a union steward.
- Consider the steward's role in building union power.
- Learn more about the role of the steward in all aspects of our union's work.

II. Challenges and Rewards of Being a Union Steward—10 mins

Ask everyone to use a few words to describe:



- The challenges of being a steward (e.g. stubborn bosses, inactive members)
- The rewards of being a steward (e.g. help members, get solutions)

Review the list of words describing the challenges faced by stewards. Ask whether they are a good summary and note additions suggested by the participants.

Explain how important it is for stewards to meet and share their approaches to dealing with these challenges.

Review the list of words describing the rewards faced by stewards. Ask whether they are a good summary and note additions suggested by the participants.

Explain that the reason for listing the rewards is to remind us why we are stewards and to help us get through all of the challenges.

Explain that stewards have many roles and that we're going to discuss these in more detail.

III. The Steward Is the Link—10 mins

Explain that many of the challenges people mentioned have to do with the common steward experience of being "in the middle." Ask everyone to look at page 2 of the Steward Handbook.

Ask if this seems similar to the participants' experience. Note that while this can be difficult (refer back to the challenges they named), it's also part of what's rewarding about being a steward.

Module Icon Key

Flip Chart



Ideas



In Handbook



Worksheet/
Handout

THE ROLE OF A UNION STEWARD



As the connector, stewards truly are the backbone of the union. Communication between all of these different parties cannot happen without a strong steward structure.

IV. Ella's Song—10 mins



Ask if anyone's heard of Ella Baker. Distribute the handout about Baker and Ella's Song and ask for volunteers to read about Baker aloud.

Play and/or read the lyrics to Ella's Song and ask how Ella's Song applies to the work of a union steward (answers may include "passing onto others that which was passed onto me," and "not needing the light just to shine on me.")

Explain that Bernice Johnson Reagon and the group Sweet Honey in the Rock composed the song, based on Ella Baker's own words.

For a Ella's Song video, see <http://www.youtube.com/watch?v=U6Uus--gFrcvisit>

V. The Steward's Role in the Union Triangle—10 mins



Pre-chart "the union triangle" (see page 6 of the Steward Handbook).

Explain that the union's role consists of all three areas represented on the triangle (representation, organizing and political/community action).



Ask what we mean by "representation," "organizing" and "political/community action."

Explain that "organizing" can be both internal—building the collective power of members already in our union, and external—helping workers to join our union.

Ask the group to think of ways that the steward contributes to each side of the triangle and write their answers in the appropriate area of the posted triangle.

Examples of answers: For representation, stewards have a role in accompanying members during disciplinary meetings. For organizing, stewards have a role in volunteering to talk to workers at locations that don't yet have a union. For political/community action, stewards have a role in talking with co-workers about important legislation or electoral issues.



Point out that the Union Triangle is explained on page 6 of the Steward Handbook.

VI. The Role of Union Stewards: Scenarios—30 mins



Break the participants into small groups and ask them to read and discuss the scenarios on the "What is the Steward's Role?" worksheet.

NOTES

To save time, you may want to assign specific scenarios (and to skip others) to each group.

Let the group know that they should select a reporter and have 15 minutes to discuss.

After a two minute warning, bring everyone back together and ask the groups to read and report back on their scenarios.

While there is no one correct answer for the scenarios, encourage the participants to consider what would best build our union's power.

VII. The Day-to-Day Work of a Steward—20 mins



Ask the participants to list the tasks that stewards do day-to-day and chart the responses. Encourage the group to think about the scenarios just discussed.

Examples of answers:

- Accompany workers at disciplinary meetings with management
- Register co-workers to vote
- Welcome/orient new employees
- Serve as the “eyes and ears” at the worksite—noticing and investigating problems
- Update the union bulletin board
- Help to organize workers at locations without unions
- Organize workers to solve problems together
- Help to update the union office's contact information for co-workers
- Listen to co-workers' problems
- Educate members about important political/community/ legislative issues
- Investigate, write, file grievances
- Explain contract language to co-workers
- Help to mobilize members during contract negotiations
- Recruit others to become stewards/to be more involved

Note that different people will be more drawn to certain tasks over others.



Ask which of the items on the list contribute most to building our union's power. Ask if the participants agree that members are the source of our union's power. If so, then the most important role of stewards is to build a united, organized and involved membership.

VIII. The Stewards' Role in Building Solidarity—15 mins



Explain that management may try to “divide and conquer” workers based on age, gender, ethnicity, nationality, race, etc., and that stewards can help to combat this tactic by bringing workers together across lines of difference.



Ask if anyone has tips for how to do this/strategies that they've observed other stewards doing and/or have tried themselves. Chart the responses.

Explain that language is often a challenge in bringing different groups of workers together. Since everyone deserves to understand and to be understood, stewards can help to identify language needs at the workplace and within our union.

As a steward, you may represent co-workers whose first language is not English (perhaps your own first language is not English).

Explain that the language tools we use to accomplish this are interpretation and translation.

Sometimes, it may seem like translation and interpretation are new ideas; but for over a century, workers of different nationalities have found ways to join together using these approaches.

Translation allows written language to be understood in another language.

Interpretation allows spoken language to be understood in another language.

There are different ways of doing interpretation, and some are more effective than others.

As a steward, you should discuss the interpretation and translation needs you observe with your union representative.



You can also help to build our union's strength by recruiting additional stewards who are bilingual or multilingual.



Point out that related information can be found on page 48 of the Steward Handbook.

IX. Skills and Tools Stewards Need for Their Roles—10 mins



Ask everyone to list the skills (good listener, know the contract, etc.) and tools (copies of the contract, list of members represented, ABC cards, etc.) a steward needs. List the skills and tools on a flip chart.

Ask if there are items on the list that people don't agree are skills or tools that a steward needs, and discuss this as a group.

Ask the stewards to look at the lists and to assess which of these skills and tools they already have and which they'd like to develop/gain. Encourage an open discussion, noting ways that the local union can assist.

WORKSHEET: WHAT IS THE STEWARD'S ROLE?

In your small group, read through each of the following situations. List what you would do as a steward and why. Choose someone to report back to the full group.

- A. Union staff are working on projects away from your workplace, such as political campaigns, organizing campaigns, etc. Members are complaining that they don't see the union representative as often as they used to.
- B. Members don't always get along. Sometimes, arguments or even fights break out between members or groups of members.
- C. UFCW members who work for your same company in a different location are bargaining their contract and they've heard that management's planning to push for major cuts.
- D. Members come to you with various problems, large and small, individual and collective. These may be suspensions or other disciplinary actions, paycheck errors, poor treatment by supervisors, new attendance policies, work areas that are too hot or cold, short staffing, etc. The members expect you to "take care of" these problems.
- E. You and other union activists where you work are looking forward to retirement within the next few years. The same retirement benefits do not exist, however, for newer hires. Many of your co-workers hold that the newer hires just don't understand what the union is all about. They say that the younger workers just don't seem to care.
- F. Many of the members where you work are recent immigrants. While some of them have exhibited courage in the face of management, many seem to be scared of speaking out about workplace hazards and discrimination.
- G. A new employee begins work during your shift.
- H. Your union has endorsed a great candidate in an upcoming local election—someone who was once a union member themselves.

HANDOUT: ELLA BAKER (1903-1983)

"The major job was getting people to understand that they had something within their power that they could use..."

—Ella Baker

Ella Baker was a hero of the civil rights movement who inspired and guided emerging leaders. Ms. Baker played a key role in some of the most influential organizations of the time, including the NAACP, Martin Luther King's Southern Christian Leadership Conference, and the Student Nonviolent Coordinating Committee.



She was born in 1903, in Norfolk, Virginia. Growing up in North Carolina, she developed a sense for social justice early on, due in part to her grandmother's stories about life under slavery. Baker studied at Shaw University in Raleigh, North Carolina where she challenged school policies that she thought were unfair. After graduating in 1927, she moved to New York City and began joining social activist organizations. She was committed to economic justice for all people and once said, "People cannot be free until there is enough work in this land to give everybody a job."

Ella Baker began her involvement with the NAACP in 1940. She worked as a field secretary and then served as director of branches from 1943-1946. Inspired by the historic bus boycott in Montgomery, Alabama, in 1955, Baker co-founded the organization In Friendship to raise money to fight against Jim Crow Laws in the deep South. In 1957, Baker moved to Atlanta to help organize, with Rev. Martin Luther King, Jr., the Southern Christian Leadership Conference (SCLC). In 1960, a group of African American college students from North Carolina A&T University refused to leave a Woolworth's lunch counter in Greensboro, North Carolina where they had been denied service.

Baker left the SCLC after the Greensboro sit-ins. She wanted to assist the new student activists because she viewed young, emerging activists as a resource and an asset to the movement. Ella Baker organized a meeting for the student leaders of the sit-ins in April 1960. From that meeting, the Student Nonviolent Coordinating Committee (SNCC) was born.

Adopting nonviolent direct action, SNCC members joined with activists from the Congress of Racial Equality (CORE) to organize the 1961 Freedom Rides. In 1964, SNCC helped create Freedom Summer, an effort to focus national attention on Mississippi's racism and to register African American voters.

Her influence was reflected in the nickname she acquired: "Fundii," a Swahili word meaning a person who teaches a craft to the next generation. Baker continued to be a respected and influential leader in the fight for human and civil rights until her death in 1986, on her 83rd birthday.

Adapted from The Ella Baker Center

HANDOUT: ELLA'S SONG

Lyrics and music by Bernice Johnson Reagon
Songtalk Publishing Co., copyright 1981

We who believe in freedom cannot rest
We who believe in freedom cannot rest until it comes

Until the killing of black men, black mothers' sons
Is as important as the killing of white men, white mothers' sons

That which touches me most is that I had a chance to work
with people
Passing on to others that which was passed on to me

To me young people come first, they have the courage where we fail
And if I can but shed some light as they carry us through the gale

The older I get the better I know that the secret of my going on
Is when the reins are in the hands of the young, who dare to run against the storm

Not needing to clutch for power, not needing the light just to shine on me
I need to be one in the number as we stand against tyranny

Struggling myself don't mean a whole lot, I've come to realize
That teaching others to stand up and fight is the only way my struggle survives

I'm a woman who speaks in a voice and I must be heard
At times I can be quite difficult, I'll bow to no man's word

We who believe in freedom cannot rest
We who believe in freedom cannot rest until it comes



HOJA DE TRABAJO: ¿CUÁL ES EL PAPEL DEL DELEGADO?

En su grupo pequeño, lea cada una de las siguientes situaciones. Enumere lo que usted haría como delegado y por qué. Elijan a alguien para que lo presente al grupo entero.

- A. El personal de la unión está trabajando en proyectos lejos de su lugar de trabajo, tal como en campañas políticas, organizando campañas, etc. Los miembros se están quejando de que no ven al representante de la unión tan frecuentemente como acostumbraban.
- B. Los miembros no siempre se llevan bien. Algunas veces, se presentan argumentos o incluso pleitos entre miembros o grupos de miembros.
- C. Los miembros de la UFCW que trabajan para la misma compañía que usted, en una ubicación diferente, están negociando su contrato y usted ha escuchado que la gerencia está planeando luchar por conseguir recortes importantes.
- D. Los miembros acuden a usted con problemas variados, grandes y pequeños, individuales y colectivos. Éstos pueden ser suspensiones u otras acciones disciplinarias, errores en su cheque de pago, tratamiento malo de parte de los supervisores, nuevas políticas de asistencia, áreas de trabajo que están muy calientes o muy frías, escasez de personal, etc. Los miembros esperan que usted se "haga cargo" de estos problemas.
- E. Usted y otros activistas de la unión donde usted trabaja están esperando con ilusión su jubilación en los próximos años. Sin embargo, no existen los mismos beneficios de jubilación para los que fueron contratados posteriormente. Muchos de sus compañeros de trabajo sostienen que los empleados más nuevos simplemente no entienden de qué se trata la unión. Dicen que los trabajadores más jóvenes simplemente no parecen interesarse.
- F. Muchos de los miembros donde usted trabaja son inmigrantes recientes. Aunque algunos de ellos han mostrado valentía frente a la gerencia, muchos parecen tener miedo de hablar sobre riesgos y discriminación en el lugar de trabajo.
- G. Un empleado nuevo comienza a trabajar durante su turno.
- H. Su unión ha avalado a un excelente candidato en una elección local próxima; es alguien que anteriormente fue miembro de una unión.

"La labor más importante fue hacer que la gente entendiera que tenía en su poder algo que podía usar..."

—Ella Baker

Ella Baker fue una heroína del movimiento de derechos civiles que inspiró y guio a líderes emergentes. La Sra. Baker desempeñó un papel clave en algunas de las organizaciones más influyentes de la época, incluyendo la NAACP, la Conferencia de Líderes Cristianos del Sur de Martin Luther King, y el Comité Coordinador Estudiantil No Violento.

Ella nació en 1903, en Norfolk, Virginia. Al crecer en Carolina del Norte, desarrolló desde muy chica un sentido de justicia social, debido en parte a las historias de su abuela sobre la vida en esclavitud. Baker estudió en la Universidad Shaw en Raleigh, Carolina del Norte, donde desafió las políticas de la escuela que ella consideraba injustas. Después de graduarse en 1927, se mudó a la Ciudad de Nueva York y comenzó a unirse a organizaciones de acción social. Ella estaba comprometida a lograr la justicia económica para toda la gente y una vez dijo: "La gente no puede ser libre hasta que haya suficiente trabajo en esta tierra como para darle un trabajo a todos".

Ella Baker comenzó su participación con la NAACP en 1940. Ella trabajó como secretaria de campo y luego sirvió como directora de filiales en 1943-1946. Inspirada por el boicot histórico a los autobuses en Montgomery, Alabama, en 1955 Baker fue cofundadora de la organización En Amistad para recaudar dinero para luchar contra las leyes de Jim Crow en el Sur profundo. En 1957, Baker se mudó a Atlanta para ayudar a organizar, junto con el Rev. Martin Luther King, Jr., la Conferencia de Líderes Cristianos del Sur (SCLC, por sus siglas en inglés). En 1960, un grupo de estudiantes universitarios afroamericanos de la Universidad A&T de Carolina del Norte se rehusó a moverse de una barra de una cafetería de Woolworth's en Greensboro, Carolina del Norte, en donde se les había negado el servicio.

Baker dejó la SCLC después de las sentadas de Greensboro. Ella deseaba ayudar a los nuevos activistas estudiantiles, porque ella veía a los activistas jóvenes emergentes como un recurso y un apoyo para el movimiento. Ella Baker organizó una reunión para los líderes estudiantiles de las sentadas en abril de 1960. A partir de esa reunión nació el Comité Coordinador Estudiantil No Violento (SNCC, por sus siglas en inglés).

Adoptando una acción directa no violenta, los miembros de SNCC se unieron con activistas del Congreso de Equidad Racial (CORE, por sus siglas en inglés) para organizar las Marchas por la libertad de 1961. En 1964, el SNCC ayudó a crear el Verano de la libertad, un esfuerzo para enfocar la atención nacional sobre el racismo en Mississippi y para inscribir a los votantes afroamericanos.

Su influencia se reflejó en el apodo que le dieron: "Fundí", una palabra en swahili que significa una persona que enseña un oficio a la siguiente generación. Baker continuó siendo una líder respetada e influyente en la lucha por los derechos humanos y civiles hasta su muerte en 1986, el día que cumplió 83 años.



Adaptado del Centro Ella Baker

Letra y música de Bernice Johnson Reagon
Songtalk Publishing Co., copyright 1981

Nosotros que creemos en la libertad, no podemos descansar
Nosotros que creemos en la libertad, no podemos descansar
hasta que arribe

Hasta que las matanzas de hombres negros, hijos de madres
negras
Sean tan importantes como las matanzas de hombres
blancos, hijos de madres blancas

Lo que me conmueve más es que tuve la oportunidad de
trabajar con gente
Transmitiendo a los demás lo que me fue transmitido

Para mí, los jóvenes son lo más importante, ellos tienen la valentía cuando nosotros fallamos
Y si yo puedo tan sólo iluminar un poco mientras nos llevan a través de la tempestad

Mientras más envejezco, más sé que el secreto de que yo continúe
Es que las riendas están en manos de los jóvenes, que se atreven a correr contra la tormenta

Sin necesidad de aferrarme al poder, sin necesitar que la luz brille sólo sobre mí
Necesito ser una entre todos, mientras nos levantamos contra la tiranía

Luchar yo sola no significa mucho, me he dado cuenta
Que enseñando a los otros a levantarse y pelear es la única forma en que mi lucha sobrevive

Soy una mujer que habla con una voz y debo ser escuchada
Algunas veces yo puedo ser bastante difícil, no me inclino ante la palabra de ningún hombre

Nosotros que creemos en la libertad, no podemos descansar
Nosotros que creemos en la libertad, no podemos descansar hasta que arribe



THE UFCW AND THE LABOR MOVEMENT

Total Time—45 minutes

Learning Goals

- Review what a union is.
- Learn more about the different roles that people have within the union.
- Consider where stewards fit within the local union's structure.
- Provide an overview of the UFCW and the broader labor movement.

Sections—Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. What is a Union?—10 minutes
- III. Union Roles—5 minutes
- IV. Creating Organizational Charts—20 minutes
- V. Overview of the UFCW and Labor—5 minutes

Materials Needed

Flip Chart, Markers, Tape

Copies of the Steward Handbook

Poster-size version of the “organizing fish” image (found in the Steward Handbook); this can be hand-drawn, photocopied and enlarged, or projected from a laptop/projector

Optional: Laptop, Projector, Screen and Internet Connection (to show UFCW websites and social media)

NOTES**I. Goals for the Training—5 mins**

Post and review the goals for the training:

- Review what a union is.
- Learn more about the different roles that people have within the union.
- Consider where stewards fit within the local union's structure.
- Provide an overview of the UFCW and the broader labor movement.

II. What is a Union?—10 mins

Post or project the “organize” fish. Ask the group what this picture has to do with understanding unions and what people see happening in the image.

Ask the participants to explain/ describe what a union is and why having one matters (this can be a large or small group discussion, or a paired exercise, depending on the size of the group).



Point out that the fish image is on page 9 of the Steward Handbook.

III. Brainstorming Union Roles—5 mins

Ask the participants to brainstorm the different types of roles in the union, giving the example “members.” Add any of the following that aren't mentioned:

- Members
- Stewards
- Executive Board
- President
- Secretary/Treasurer
- Staff

As the categories are mentioned, ask the group to explain the role of each, noting how stewards, executive board members, officers and staff are selected or elected (this differs by local).

Module Icon Key

Flip Chart



Ideas



In Handbook



Worksheet/
Handout

IV. Creating Organizational Charts—20 mins

Ask the participants to work in small groups to create an organizational chart that they feel represents the relationship between these different categories of people at the local. Emphasize that they need to place themselves as stewards on the chart. Explain that there is no right way to do this; the goal is to have the discussion.



Give each group a large piece of paper and a marker and let them know that they have five minutes to complete their organizational chart. After giving a one minute warning, bring everyone together and ask the groups to post their charts at the front of the room.

Ask the group what they notice—similarities and differences. Emphasize that members are the union and that stewards are what make the union real at the workplace.

V. Overview of the UFCW and Labor—5 mins

Explain that just like there's a structure at the local, that there's also a national and global structure for the UFCW and the labor movement.

Nationally, there are approximately 13 million people who belong to unions.

There are approximately 1.3 million UFCW members in the U.S. and Canada, with hundreds of local unions, like ours.



UFCW members work in:

- Supermarkets and grocery stores
- Meatpacking and meat processing plants
- Food processing and general manufacturing
- Non-food retail stores
- Warehouse/distribution
- Healthcare

The UFCW International Union (IU) has offices in Washington D.C. International Union staff help to coordinate the work of local unions—especially through organizing campaigns, political and community coalitions, legislative and electoral efforts, member education, safety and health, communications/media and legal assistance.

The IU has an executive board, president, secretary-treasurer and executive vice presidents. Every five years, the UFCW has a convention that brings together delegates from local unions across the U.S. and Canada.

THE UFCW AND THE LABOR MOVEMENT

Our union has a constitution followed by all of the locals (you may wish to have this on hand to pass around).

Project the UFCW Website and social media sites and encourage the participants to explore these further.

Mention any state-wide and/or local labor councils the local belongs to.

Conclude by reinforcing that unions are democratic organizations and that members are the union.



Point out that the list of industries represented by the UFCW can be found on page 4 of the Steward Handbook.

NOTES

TAKING HISTORY TO HEART

Total Time—1.5 hours

Learning Goals

- Share your own and learn about other members' family/community labor history.
- Explore key moments in the history of the UFCW and the labor movement.
- Discuss how we can “take history to heart”—what the implications are for our struggles today.

Sections —Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. Sharing Our Own History—15 minutes
- III. Labor History Timeline—30 minutes
- IV. “Making History” Video and Discussion—40 minutes

Materials Needed

“Making History” DVD (available from the UFCW International Union’s Organizing Department)
DVD player/projector (with speakers) and a screen or blank wall is needed for the video
Pens (enough for each participant)
3" x 5" post-it notes (enough for each participant)

Handouts/Worksheets

Labor History Timeline (50 wall pieces enlarged as posters)

Preparing for the Workshop

Allow ample time for set up (approx. 20 minutes) to hang the labor history timeline. The timeline wall pieces are included at the end of this section. Make sure that there is adequate empty wall space for posting the timeline. Before the training, you will need to take the timeline pages and have them blown up, poster size (22" x 28", 24" x 36", etc). If you plan to use the history timeline at multiple trainings, you may wish to have them laminated.

Decide, in advance, how you’ll attach the timeline pieces to the walls of the training room (i.e. painter’s tape, tacks, etc).

To save space, you may want to hang the image that corresponds with each history moment directly below the text.

NOTES**I. Goals for the Training—5 mins**

Post and review the goals for the training:

- Share your own and learn about other members' family/community labor history.
- Explore key moments in the history of the UFCW and the labor movement.
- Discuss how we can “take history to heart”—what the implications are for our struggles today.

II. Sharing Our Own History—15 mins

Flip-chart the following directions: Select someone from your family/community and write their name and occupation on a post-it note.

Indicate if they belonged to a union and/or about their work history overall.

Explain that what people share about their family's work history does not need to be union-related. Perhaps their mother was a farmer and belonged to a farmer's cooperative. Or their grandmother cared for other people's children. Encourage people to think broadly and assure them that they can use multiple post-it notes to represent multiple people. They may also choose to write about themselves.

Tell the group that once they're done writing, they should pair up and introduce themselves to another participant and share the stories represented on their post-it notes. Explain that they have 10 minutes for these paired discussions.

III. Labor History Timeline—30 mins

Bring everyone back together. Ask the participants to take their post-it notes and place them on the timeline (with all of the labor history events and images) that's already up on the wall. Ask them to place the post-its on or near a history timeline wall piece that's close to the time period that their post-it represents.

In addition to placing their own histories on the wall, ask everyone to walk along the timeline. Ask them to do this with their partners from the paired

Module Icon Key

Flip Chart



Ideas



In Handbook



Worksheet/
Handout



discussion. Explain that together, they should note which events and images on the timeline most interest them. Specifically, ask people (chart this):

- What events seem most relevant to what we're facing today?
- What events are new to you?
- What events would you like to learn more about?

Ask everyone to also read the post-it notes. Mention that there are many events missing and encourage the participants to add (using the post-it notes) to the timeline.

After the group has been walking around for ten minutes (or when it seems that people have had a chance to read most of the timeline), bring everyone back together.

Ask what people noticed on the timeline.

- "What moments stood out to you and why?"
- "What events seem most relevant to what we're facing today?"
- "What events are new to you (did you just learn about)?"
- "What events would you like to know more about?"
- "Are there any patterns that you noticed?"

Explain that we're now going to learn more about a few of the events mentioned on the wall.

IV. "Making History" Video and Discussion—40 mins

Explain that there are many great films about working people and that the one we're going to watch contains three brief clips about different moments in labor history. Note: If you're short on time you may choose to only show one or two of the clips. You may also wish to show one chapter, pause the video and discuss, repeat, etc.

Each chapter of the DVD is approximately seven minutes; the first is about the Bread and Roses textile strike in Lawrence, MA, the second is about the autoworkers' sit-down strike in Flint, MI and the third is about the United Farmworkers' grape boycott in CA. Play the DVD. (20 mins)

Facilitate a large-group discussion about the film. (20 mins)

Begin the discussion after the video by asking people for general reactions. Then, ask:

- What did the video show about the relationship of unions to broader social change?
- What examples from the video apply to our situation today? What are the implications for our union?

NOTES

Refer to this goal of the workshop: How we can “take history to heart”—what the implications are for our struggles today.



Explain that UFCW members—including everyone in the room—make history each day.

Ask what ideas the participants have for explaining this to their co-workers and for sharing more with them about labor history. Ask what history has been collected about the local union and/or of workers in the area and encourage the participants, if they're interested, to research and learn more.

For more information on the UFCW's history, see <http://www.ufcw.org/about/ufcw-history/>

For a comprehensive list of labor history films and other resources, see <http://www.niu.edu/~rfeurer/labor/culture.html>

1739

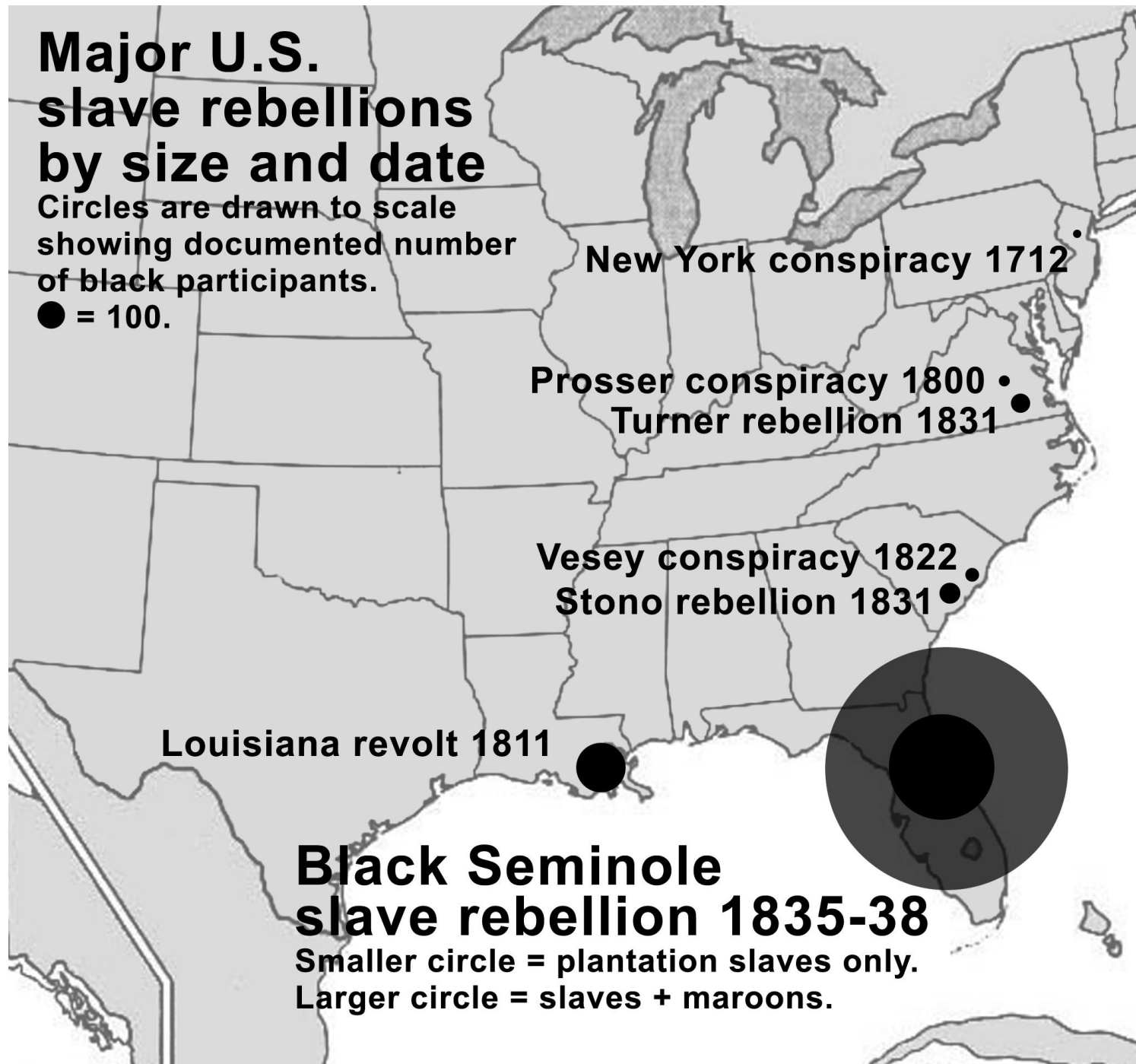
Stono Slave Rebellion

The Stono slave rebellion was the largest slave uprising in the colonies prior to the revolution. In response to the rebellion, the South Carolina legislature passed the Negro Act of 1740 restricting slave assembly, education and movement. It also enacted a 10-year moratorium against importing African slaves based on the incorrect theory that domestically born slaves would resist less. It also required legislative approval for the freeing of any slaves. Congress would not pass the 13th Amendment banning slavery until 1865. The hundreds of slave uprisings that occurred are critical points in early U.S. labor history.

Major U.S. slave rebellions by size and date

Circles are drawn to scale
showing documented number
of black participants.

● = 100.



Late 1880s

Knights of Labor

The Knights of Labor were known for their inclusiveness, accepting women and African American members (though they also supported the Chinese Exclusion Act and ignored segregation in their own Southern assemblies). They were against child and convict labor and supported equal pay for women. They also opposed the wage system, believing that cooperative efforts would allow workers to escape wage slavery. In 1886, packinghouse workers in Chicago organized with the Knights.



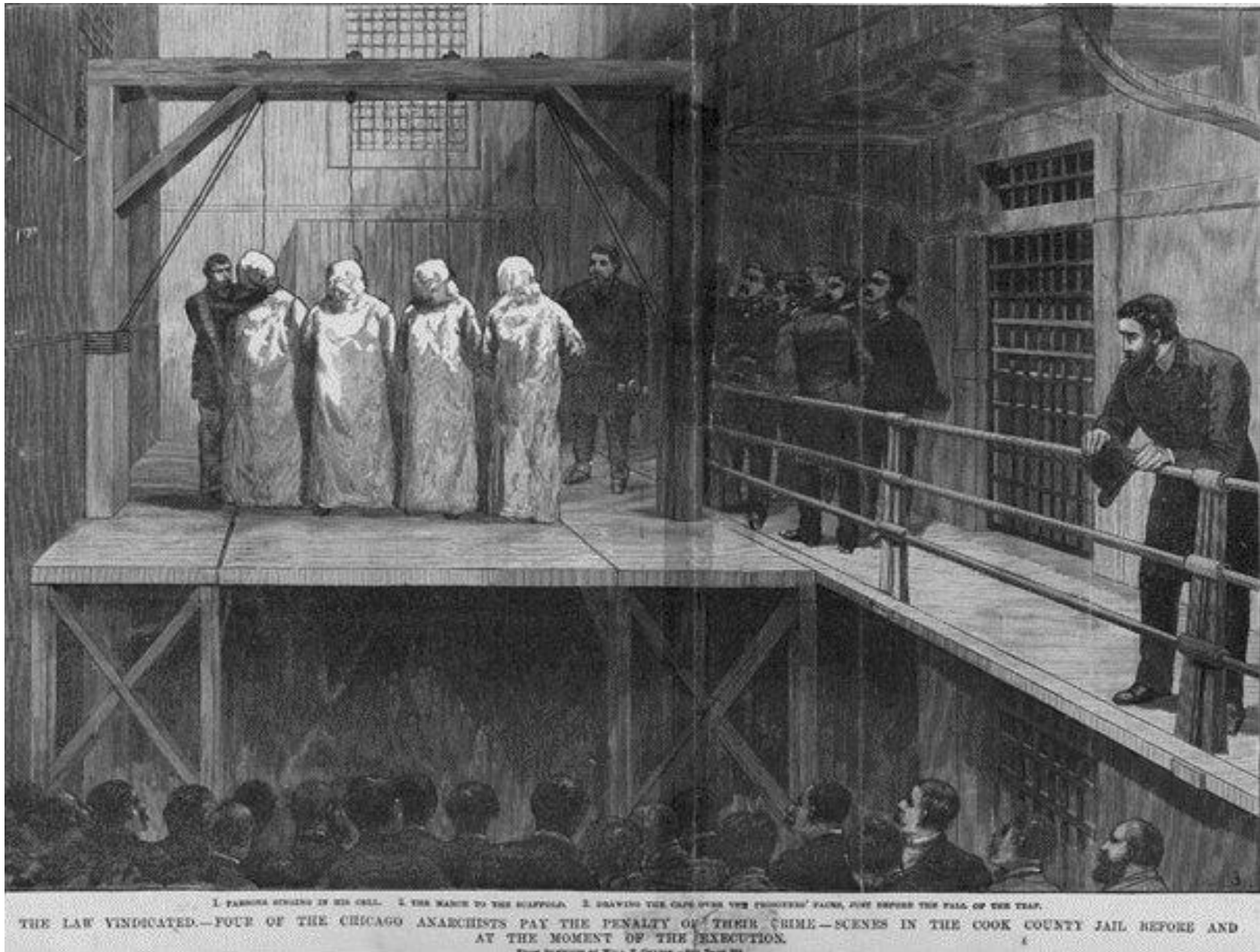
Women delegates at the national meeting of the Knights of Labor in 1886. Women belonged to separate associations that were affiliated with local all-male unions. (*Library of Congress*)

1886

Haymarket

The events at Haymarket Square in Chicago mark the origin of May Day (International Workers' Day).

On May 4, 1886, workers in Chicago gathered for a peaceful rally to win an eight-hour workday. An unknown person threw a dynamite bomb and eight anarchists were convicted. Even though the evidence showed that none of defendants had thrown the bomb, seven were sentenced to death and one to a term of 15 years in prison. The death sentences for two of the defendants were commuted to terms of life in prison, and another committed suicide in jail rather than face the gallows. The other four were executed on November 11, 1887. In 1893, Illinois' new governor pardoned the remaining defendants and criticized the trial.



Scene from the Cook County Jail (Haymarket activists executed).

1890

Retail Clerks National Protective Union

In 1888, the average retail employee earned \$10 per week for 86 hours of work while receiving no holidays, no sick pay, no pensions and no insurance. The Retail Clerks International Union, then known as the Retail Clerks National Protective Union (RCNPA), was chartered by the American Federation of Labor in 1890. At the point that it was chartered, the union was made up only of workers from the Clothing and Gents Furnishings and Shoe Store in Muskegon, Michigan. Two years later, the RCNPA chartered with seven locals, and its membership spread throughout the Midwest, including stores in Indiana, Minnesota, Colorado, Ohio and Illinois. By 1899, the union officially became an international when a local was chartered in British Columbia, Canada.



Retail Clerks, circa 1900

1892

Homestead Strike

The Homestead Steel Works strike and the ensuing bloody battle remains a transformational moment in U.S. history. The skilled workers at the steel mills in Homestead were members of the Amalgamated Association of Iron and Steel Workers who had bargained good wages and work rules. Homestead's management, including owner and millionaire Andrew Carnegie, were determined to lower costs and destroy workers' rights.

In the end, they employed not only Pinkertons and scabs, but also 8,000 state troops to break the union.

HARPER'S WEEKLY

A JOURNAL OF CIVILIZATION

NEW YORK, SATURDAY, JULY 16, 1892.

TEN CENTS A COPY.
FOUR DOLLARS A YEAR.



THE HOMESTEAD RIOT.—DRAWN BY W. F. SAYRE AFTER A PHOTOGRAPH BY DARR, PITTSBURGH.—[SEE PAGE 678.]
THE FUGITIVE MEN LEAVING THE BARRICKS AFTER THE SURRENDER.

1897

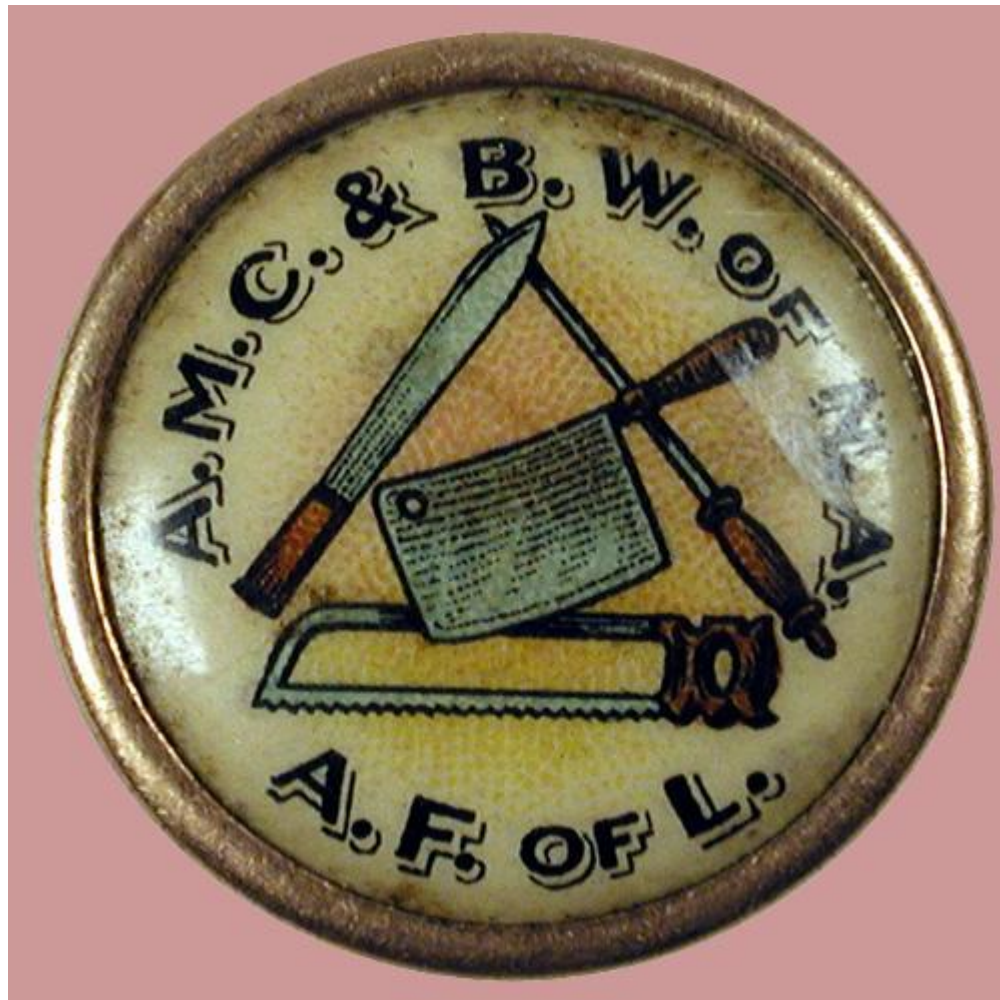
Amalgamated Meat Cutters, & Butcher Workmen Founded

The Amalgamated Meat Cutters and Butcher Workmen of North America (AMC & BW of NA) was chartered by the American Federation of Labor in 1897 with seven locals; five of them composed of mostly skilled retail workers.

In most meat packing plants, unskilled workers were the majority. Of this majority, 60 percent earned less than \$6 a week. Skilled workers were paid better, with their wages ranging from \$3 – \$3.50 a day.

In 1903, the union demanded that the wages of the skilled workers be raised by 10 percent. The following year, the union asked that the wage increase be extended to both skilled and unskilled workers.

After this demand, the companies' response was to reduce hourly rates for all workers. In 1904, the union organized a nationwide strike with 50,000 members participating. The strike ended in defeat, with a severe decline in membership as well as a long list of strikers being permanently blacklisted.



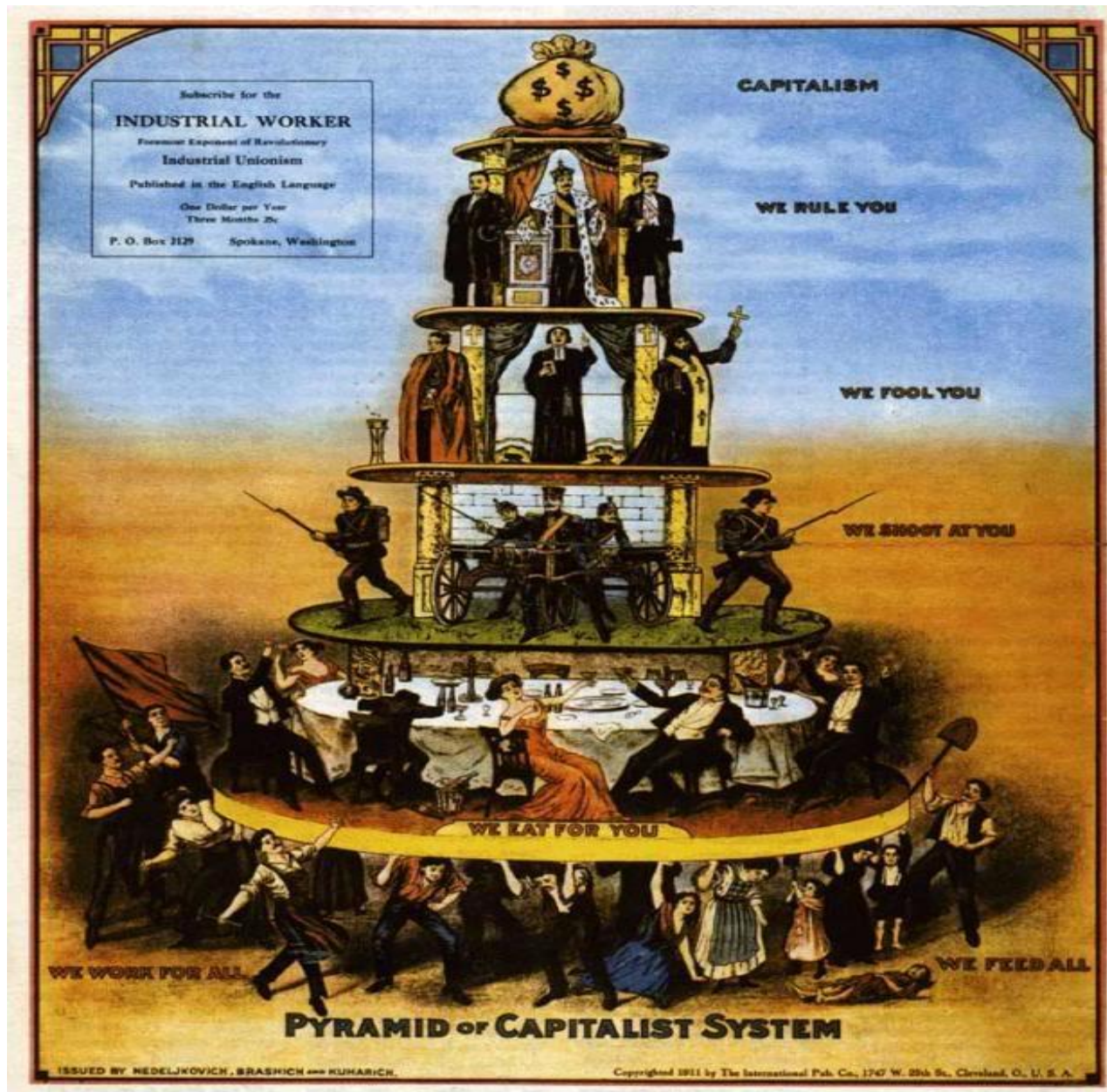
1905

Industrial Workers of the World (IWW)

The Industrial Workers of the World (IWW or the Wobblies) was formed in 1905. At its peak in 1923, the organization had around 100,000 members. IWW membership declined after government repression as part of the first Red Scare.

The IWW contends that all workers should be united as a class and that the wage system should be abolished. They are known for the Wobbly Shop model of workplace democracy, in which workers elect their managers and other forms of grassroots democracy.

The IWW continues today, organizing Starbucks workers, fast-food workers, bike messengers and others.



IWW poster circa 1911

1909 & 1911

Uprising of the 20,000 & Triangle Shirtwaist Fire

In November 1909, more than twenty thousand Yiddish-speaking immigrants, mostly young women, launched an eleven-week general strike in New York's shirtwaist industry. Dubbed the Uprising of the 20,000, it was the largest strike by women to date in U.S. history. The strikers' courage forced the predominantly male leadership of the unions to revise their entrenched prejudices against organizing women.

Two years later, the fire at the Triangle Waist Company in New York claimed the lives of 146 young immigrant workers (some of whom participated in the 1909 strike), one of the worst disasters since the beginning of the Industrial Revolution. The disaster spurred decades of organizing around occupational safety and health.



Striking workers in the Uprising of 20,000 (1909).

1912

“Bread & Roses” Strike

Led by the Industrial Workers of the World, the strike of immigrant workers in Lawrence, Massachusetts grew to more than 20,000 workers at nearly every textile mill within a week. It lasted more than two months and defied the idea that immigrant workers (speaking many different languages) could not be organized. It is called “bread and roses” in reference to the workers’ call for bread (wages) as well as roses (beauty and good things in their lives).



Children of striking Lawrence, MA mill workers, 1912.

1910-1930

The Great Migration

The Great Migration was the movement of 4.1 million African Americans out of the Southern United States to the North, Midwest and West. It greatly increased the number of African American workers in the North, many of whom still experienced racism and organized for change within their unions and organizations.



Picket line at the Mid-City Realty Company, Chicago, Illinois, July 1941 John Vachon, Photographer

1934

Widespread Strikes!

- Minneapolis Truckers
- Seattle General
- Southern Textile Workers' "Uprising of '34"
- Toledo Auto-Lite



Hand-to-hand combat in the streets, Minneapolis Truckers' Strike 1934

1935

National Labor Relations Act

(NLRA)

The National Labor Relations Act is the federal law that allows workers to collectively bargain with their employers and take part in strikes. It does not apply to workers covered under the Railway Labor Act, farmworkers, public workers or independent contractors.

Following its passage, unions begin large-scale campaigns and actions, including coordinated strikes in the auto and steel sectors.



CIO organizing poster, circa 1935

1943

United Packinghouse Workers of America (UPWA)

The epic two-year strike against the Morrell Company, which ended in 1937 with a union victory, helped strengthen packinghouse workers. Later that year, the Congress of Industrial Organizations formed the Packinghouse Workers Organizing Committee (PWOC). PWOC organized African American and white workers together and fought against all forms of discrimination.

In 1943, the PWOC was dissolved to form the United Packinghouse Workers of America (UPWA). By 1953, the two unions had agreed to coordinate collective bargaining with national meat packing companies.

15 years later, the UPWA and the Amalgamated Meat Cutters and Butcher Workmen of North America merged, uniting two strong unions and almost half a million members. The union of the two created one of the most powerful and progressive worker organizations seen in the history of the labor movement.

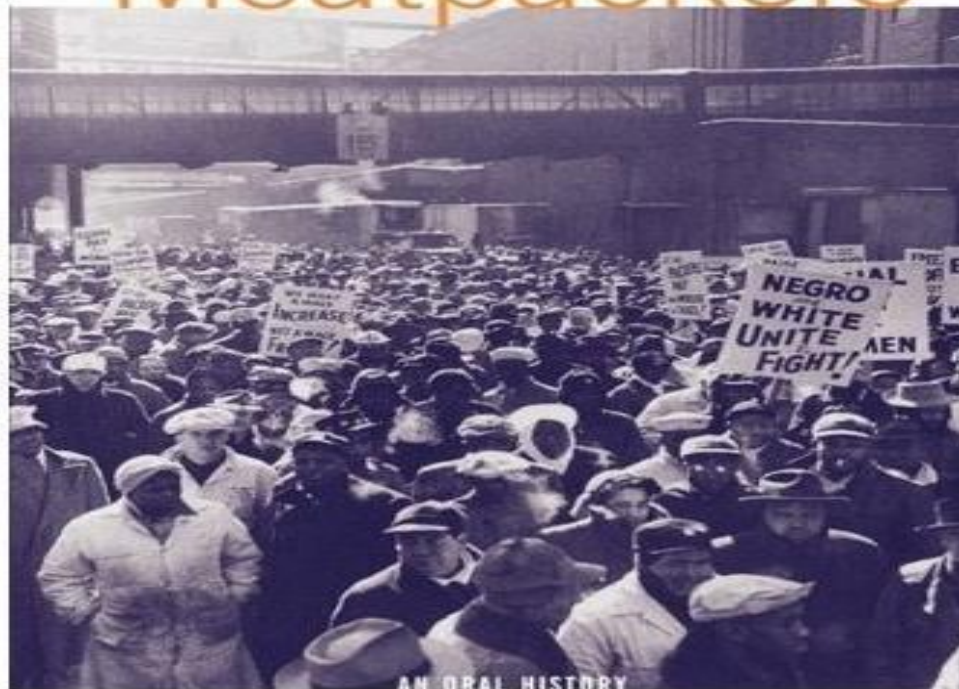
UPWA YEARLY MEMBERSHIP CARD
UNITED PACKINGHOUSE
WORKERS OF AMERICA 1954
L. U. No. 54
Name Roland Boyd
Address
Lodger No. 1367 Dept. Load Dock
Signed *Dan Nelson*
NOT GOOD AFTER DEC. 31, 1954 FIN. SECT. - TREAS.
UPWA FORM 20 PRINTED IN U. S. A.

UPWA YEARLY MEMBERSHIP CARD
UNITED PACKINGHOUSE
WORKERS OF AMERICA 1955
L. U. No. 54
Name Roland Boyd
Address
Lodger No. Dept. Loading Dock
Signed *John C. Taylor*
NOT GOOD AFTER DEC. 31, 1955 FIN. SECT. - TREAS.
UPWA FORM 20 PRINTED IN U. S. A.

UPWA YEARLY MEMBERSHIP CARD
UNITED PACKINGHOUSE
WORKERS OF AMERICA 1956
L. U. No. 54
Name R. Boyd
Address
Lodger No. 1367 Dept. BP. Load Unload
Signed *Dan Nelson*
NOT GOOD AFTER DEC. 31, 1956 FIN. SECT. - TREAS.
UPWA FORM 20 PRINTED IN U. S. A.

UPWA YEARLY MEMBERSHIP CARD
UNITED PACKINGHOUSE
WORKERS OF AMERICA 1956
L. U. No. 54
Name Roland Boyd
Address 7721 Colton Drive
Lodger No. Dept. Loading Dock
Signed *John C. Taylor*
NOT GOOD AFTER DEC. 31, 1956 FIN. SECT. - TREAS.
UPWA FORM 20 PRINTED IN U. S. A.

Meatpackers



AN ORAL HISTORY
OF BLACK PACKINGHOUSE WORKERS AND
THEIR STRUGGLE FOR RACIAL AND ECONOMIC EQUALITY

Rick Halpern and Roger Horowitz

1947

Taft-Hartley Legislation

After the largest strike wave in U.S. history in 1946, Congress passes the Taft-Hartley Act to prohibit sympathy strikes, secondary boycotts and restrict many of the most effective tactics of unions. The 1959 Landrum-Griffin Act further limits picketing rights and completely outlaws secondary boycotts.



ILWU float protesting the Taft-Hartley Act, 1947, HBCLS Collection

1950s-1970s

Fighting for Equality

The emergence of the African American civil rights movement (Civil Rights Act passed in 1964) inspires other groups to seek equality as well.

Unions benefit from, contribute to, and are challenged by these movements.

The Coalition of Black Trade Unionists (CBTU), the A. Phillip Randolph Institute, the Coalition of Labor Union Women (CLUW), the Asian Pacific American Labor Alliance (APALA), the Labor Council for Latin American Advancement (LACLAA) and Pride at Work (LGBT labor) all come out of this history.



Gay Pride march, 1970s

1967-1970

Farmworkers' Grape Boycott

In 1965, Mexican and Filipino grape workers in Delano, California walked off the job. An even larger strike led by the Filipinos against all the grape companies in the Delano area was supported by the UFWA. When the strike was not successful in completely halting field work, organizer Caesar Chavez led a march to California's state capitol to inspire farm workers to join the union. The UFWA then decided to call a boycott of a liquor company who owned the vast majority of the vineyards in the San Joaquin Valley.

This was a success and soon other grape producers were forced to sign contracts. Chavez sent representatives throughout the country to coordinate boycott meetings and fundraising efforts. For the next four years, the United Farm Workers Organizing Committee decided to boycott all table grapes; receiving wide public support. The boycott was the most successful in American history and in 1970, the pressure of the ongoing boycott resulted in the signing of contracts that provided many workers with better conditions.



UFW President Cesar Chavez, farmworkers and their families march in 1966.

1970

Postal Strikes & OSHA Created

More than 200,000 U.S. Post Office workers in fifteen states engage in a wildcat strike to force Congress to raise wages. It is the first major strike by federal employees, for who striking is illegal.

Following more than a century of organizing, Congress passes the Occupational Safety and Health Act requiring employers to ensure workplace safety.



Striking Letter Carriers in 1970 shout at a picket line.

1968

Memphis Sanitation Strike

Citing years of poor treatment, discrimination, dangerous working conditions, and work-related deaths, some 1,300 African American city sanitation workers walked off the job in protest and sought to join the American Federation of State, County and Municipal Employees (AFSCME).

The mayor of Memphis declared the strike illegal and refused to meet with local African American leaders. Carrying signs that read “I am a Man,” the workers brought national attention to the disrespect they experienced on the job.

The Reverend Martin Luther King, Jr. visited Memphis to address the strikers and was assassinated.



Striking sanitation workers in Memphis, TN, 1968.

1979

UFCW Formed

The merger of the Retail Clerks and the Amalgamated Meat Cutters Union in 1979 united two union powerhouses, both with a long history of fighting for justice and economic security for working people. It was this merger that gave life to the United Food and Commercial Workers International Union.



1981 PATCO

The newly-elected Reagan administration signals its hostile intent to organized labor when it fires thousands of striking Professional Air Traffic Controllers (PATCO).

More than 400,000 union members participate in labor's first Solidarity Day demonstration in Washington, D.C., to protest the Reagan administration's labor policies and the firings.



PATCO workers strike, 1981

2000

Organized Labor Reverses Position on Immigration

The AFL-CIO announced a historic change in its position on immigration. Reversing the traditional stance of labor, the federation declared that it would no longer press to reduce high immigration levels or call for rigorous enforcement of failed immigration laws. Instead, it would support general amnesty for undocumented workers and push for real immigration reform.

The change is a victory for immigrants and their allies who have been organizing within their unions and leading campaigns for decades. In 2003, union members come together for an “Immigrant Workers Freedom Ride” across the country.



Immigrant Workers Freedom Ride, NYC 2003

2003

Southern California

Grocery Strike

64,000 courageous members at Albertson's, Kroger and Safeway go on strike for 141 days. Through the members' willingness to stay out on the picket line, the UFCW was able to blunt the threat of wage and healthcare cuts.

Many of the strikers were part-time workers and their struggle struck a chord with the public throughout southern California. For weeks on end, consumers stayed away from the supermarkets involved in the dispute, resulting in significant financial losses for the companies.



2003 Southern California Grocery Strike

2008

UE Sit-Down Strike at Republic Windows & Doors

Given no notice that their plant would be closing, the 240 workers of the Goose Island factory began an organized sit-down strike. The sit-in lasted until the workers reached a successful settlement with the factory and its creditors (including Bank of America & JP Morgan Chase) over severance, vacation time, and health care benefits.



Workers and family members during the Republic Windows & Doors Factory Occupation, 2008

2008 Smithfield Workers in Tar Heel, NC Join the UFCW

After 16 years of difficult organizing effort supported by the UFCW, workers at the Smithfield Packing Plant in Tar Heel, NC, finally obtained union recognition and a collective bargaining agreement that greatly improved their wages, benefits and working conditions. This was a huge success for the more than 4,000 Smithfield employees who are now represented by UFCW Local 1208 (the local union number reflects the date the workers gained union recognition, December, 2008).



Smithfield workers in Tar Heel, NC on the day of the union vote, 2008

2000-Present

Walmart Workers Stand Up

In 2000, Walmart workers in Jacksonville, TX make history by organizing together to join the UFCW.

In 2011, nearly 100 Associates representing thousands of Organization United for Respect at Walmart “OUR Walmart” members from across the country deliver a Declaration of Respect to Walmart executives (this action is repeated, with more associates, in 2012 and 2013).

In 2012, thirty Walmart warehouse workers in Southern California walk off the job to protest inhumane conditions. They’re joined by fifty other workers on a six-day march that draws national attention. Later that year, hundreds of Walmart workers, supported by thousands of allies, hold direct actions on Black Friday, sending a strong message on the store’s busiest day.

In 2013, OUR Walmart members joined with union, community and student allies for a historic, national “Summer of Respect.”



OUR Walmart members and supporters in California following the warehouse workers' march, 2012

UNDERSTANDING OUR CONTRACT

Total Time—1 hour

Learning Goals

- Learn more about what's in our contract.
- Practice finding specific language in our contract.
- Discuss collective bargaining and the factors that go into contract negotiations.

Sections—Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. Where is that in the Contract?—25 minutes
- III. Understanding the Bargaining Process—30 minutes

Materials Needed

Flip Chart, Markers, Tape
Copies of the Steward Handbook

Handouts/Worksheets

Factors that Affect the Outcome of Bargaining Worksheet
Learning More About Our Contract Worksheet

NOTES**I. Goals for the Training—5 mins**

Post and review the goals for the training:

- Learn more about what's in our contract.
- Practice finding specific language in our contract.
- Discuss collective bargaining and the factors that go into contract negotiations.

II. Where is That in the Contract?—25 mins

Ask the stewards to take out their contracts. Explain that you are distributing a list of questions about their union contract and that they will work in groups to look up the answers together. Divide everyone into small groups and ask each group to select a reporter.

Explain that they have 20 minutes for the exercise and remind them that some topics may be addressed in more than one section of the contract.

After 20 minutes, bring everyone back together (provide a two minute warning).

Ask the reporter from one group what they found for the first question.



List the letter for their answer on the flip chart. Ask if any of the other groups had a different response. Review the answers until everyone understands the contract language.

Repeat this process for each question.

Ask the stewards what else they learned while looking up specific information in the contract. Answers may include:

- It can be difficult
- More than one section can address the same issue
- Sometimes sections of the contract seem to contradict each other
- It helps to use the contents page and/or index when looking up specific language

Module Icon Key

Flip Chart



Ideas



In Handbook

Worksheet/
Handout

UNDERSTANDING OUR CONTRACT

Note that there may be ways to make our contract language clearer/easier to understand in the future; we can note this and raise it during future bargaining sessions.

III. Understanding the Bargaining Process—30 mins

Ask if anyone has been a part of negotiating a contract before as a member of this union or another—and what this was like.

The bargaining process begins with input from the membership. Then, a bargaining committee comes together and presents the members' proposals to management. Management comes back with counter-proposals and there's a lot of back and forth. Eventually, there is a contract offer to vote on. Only members covered by the contract get to vote on it. Once the contract is ratified, it's up to the stewards to make sure that the company follows it.

Explain that through collective bargaining, union members join together to win the best possible wages, benefits and working conditions. How can we strengthen our bargaining position so that we can win better contracts? What are some of the factors that influence collective bargaining? The exercise we're going to do is designed to explore these questions.



Break participants into small groups and ask them to spend the next ten minutes completing the “Factors that Affect the Outcome of Bargaining” worksheet. Explain that if their group has a hard time coming to agreement, that they can report back about their different opinions. Ask each group to select a reporter.



After giving the groups a two minute warning, bring them back together and ask each reporter to write their group's numbers for each category on the flip chart (pre-chart the worksheet categories).



Ask the group to explain any factors that have different numbers. Distribute the “Factors that Affect the Outcome of Bargaining” handout. Conclude by reinforcing the importance of a united and active membership, and the role of stewards in making this happen.

Explain that it's also critical for stewards to help explain the bargaining process to other members.

NOTES

WORKSHEET: LEARNING MORE ABOUT OUR CONTRACT

Answer the questions below, according to your union contract. Note where you found the information by article, section, and page number.

1. Who is covered by the contract? Who isn't covered? (which job titles, types of workers, etc.)

Article, section, and page number:

2. Are working conditions/ safety and health mentioned in the contract?

Article, section, and page number:

3. Is there anything about shifts, scheduling and/or days off in the contract?

Article, section, and page number:

4. Is there anything that pertains to harassment or discrimination by supervisors?

Article, section, and page number:

5. Where is the grievance procedure explained?

Article, section, and page number:

WORKSHEET: FACTORS THAT AFFECT THE OUTCOME OF BARGAINING

Below are ten of the many factors that influence our power and ability to bargain strong contracts. Which of these factors is most important?

In small groups, decide how you think these factors should be prioritized, writing in a number from 1-9 for each (1 being the most important and 9 the least). Be prepared to explain why your group rated each factor as it did.

Factors:

Prioritization Number:

- | | |
|--|-------|
| 1. Skilled negotiators | _____ |
| 2. Non-union competitors | _____ |
| 3. Union's political influence | _____ |
| 4. United and active membership | _____ |
| 5. Percent of all workers in the area who belong to unions | _____ |
| 6. Ability to strike | _____ |
| 7. Finances of the employer | _____ |
| 8. Community support | _____ |
| 9. Non-union parts of the same company | _____ |



What other factors can affect bargaining?

WORKSHEET: FACTORS THAT AFFECT THE OUTCOME OF BARGAINING

Skilled negotiators

While skilled negotiators are extremely important, the best negotiator in the world cannot win a decent agreement if the union has little or no bargaining power.

Non-union competitors

Unionized employers respond to competition from non-union rivals by demanding concessions from the union. Rather than lowering standards, unions must organize non-union competitors to raise industry standards.

Union's political influence

The union's political influence can be used to achieve better labor laws, to block non-union employers from entering some markets, and to get elected officials to support the union and pressure employers.

United and active membership

Everything the union does requires united and active members. Employers at the bargaining table are influenced by the level of unity and support they see among the union's membership.

Percent of area workers organized

When companies bargain with the union they compare what they pay to what other similar employers are paying. If most other workers are non-union, with lower wages and fewer benefits, employers argue that they shouldn't pay more. That's why it is important that all unions organize in order to raise standards.

Ability to strike

While we hope to avoid strikes, the ability to withhold labor and shut down an employer remains a key source of union bargaining power. But if the employer can continue to operate during a strike by employing scabs (replacement workers), a strike loses much of its power. Sometimes employers plan for strikes so that they can hold out for a long time. They decide they will save more money by resisting union demands than they will lose during the strike.

Finances of the employer

It is harder to win economic gains from employers that are not doing well financially. However, even employers with good profits may decide to resist union demands or ask for concessions.

Community support

Especially in consumer industries, community support is important. We may ask our neighbors to not buy a certain product or to shop only at union stores that are not on strike. Community leaders and organizations can help by pressuring employers to treat their employees fairly.

Non-union parts of the same employer

When an employer has unorganized units that can provide the same goods or services produced by the unionized units, the bargaining strength of the unionized units is severely impaired. In the event of a strike, the employer can still operate and profit from the non-union parts of the company.

HOJA DE TRABAJO: APRENDIENDO MÁS SOBRE NUESTRO CONTRATO

Responda a las preguntas de abajo de acuerdo a su contrato sindicalizado. Apunte dónde encontró la información con el artículo, sección y número de página.

1. ¿Quién está cubierto por el contrato? ¿Quién no está cubierto? (qué títulos de puestos, tipos de trabajadores, etc.)

Artículo, sección y número de página:

2. ¿Se mencionan las condiciones laborales/ seguridad y salud en el contrato?

Artículo, sección y número de página:

3. ¿Hay algo sobre turnos, programación y/o días libres en el contrato?

Artículo, sección y número de página:

4. ¿Hay algo relacionado a acoso o discriminación de parte de los supervisores?

Artículo, sección y número de página:

5. ¿Dónde se explica el procedimiento de reclamaciones?

Artículo, sección y número de página:

HOJA DE TRABAJO: FACTORES QUE AFECTAN EL RESULTADO DE NEGOCIACIONES

Abajo están diez de los múltiples factores que influyen en nuestro poder y capacidad para negociar contratos sólidos. ¿Cuál de estos factores es el más importante?

En grupos pequeños, decidan qué prioridad piensan que debería dársele a estos factores, escribiendo un número del 1-9 para cada uno (1 siendo el más y 9 el menos importante). Prepárese para explicar por qué su grupo calificó a cada factor como lo hizo.

Factores:

Número de prioridad:

- | | |
|---|-------|
| 1. Negociadores hábiles | _____ |
| 2. Competencia no sindicalizada | _____ |
| 3. Influencia política de la unión | _____ |
| 4. Membresía unida y participativa | _____ |
| 5. Porcentaje de todos los trabajadores del área que pertenecen a una unión | _____ |
| 6. Capacidad de declararse en huelga | _____ |
| 7. Finanzas del patrón | _____ |
| 8. Apoyo de la comunidad | _____ |
| 9. Partes no sindicalizadas de la misma compañía | _____ |



¿Qué otros factores pueden afectar a la negociación?

Negociadores hábiles

Aunque los negociadores hábiles son extremadamente importantes, el mejor negociador en el mundo no puede obtener un acuerdo decente si la unión tiene un poder de negociación escaso o nulo.

Competencia no sindicalizada

Los patrones que tienen uniones responden a la competencia de rivales no sindicalizados demandando concesiones de parte de la unión. En lugar de bajar los estándares, las uniones deben organizar a la competencia no sindicalizada para elevar los estándares de la industria.

Influencia política de la unión

La influencia política de la unión puede usarse para lograr mejores leyes laborales, para impedir a empleadores no sindicalizados la entrada a algunos mercados y para lograr que los funcionarios electos apoyen a la unión y ejerzan presión sobre los patrones.

Membresía unida y participativa

Todo lo que la unión hace requiere de miembros unidos y participativos. Los patrones en la mesa de negociación son influenciados por el nivel de unión y apoyo que ven entre la membresía de la unión.

Porcentaje de trabajadores del área que están organizados

Cuando las compañías negocian con la unión, ellos comparan lo que ellos pagan con lo que están pagando otros patrones similares. Si la mayoría de los demás trabajadores no están sindicalizados, y tienen salarios más bajos y menos beneficios, los patrones argumentan que ellos no deberían pagar más. Es por esto que es importante que todas las uniones se organicen, para elevar los estándares.

Capacidad de declararse en huelga

Aunque deseamos evitar huelgas, la capacidad de abstenerse de trabajar y cerrar a un patrón continúa siendo una fuente clave del poder de negociación de la unión. Pero si el patrón puede continuar operando durante una huelga empleando esquiroles (trabajadores de reemplazo), una huelga pierde mucho de su poder. Algunas veces los patrones hacen planes para una huelga, de manera que ellos pueden aguantar mucho tiempo. Ellos deciden que ahorrarán más dinero resistiendo las demandas de la unión, que lo que perderán durante la huelga.

Finanzas del patrón

Es más difícil obtener ganancias económicas de patrones que no están pasándola bien económicamente. Sin embargo, incluso los patrones con buenas ganancias pueden decidir resistirse a las demandas de la unión o pedir concesiones.

Apoyo de la comunidad

Especialmente en industrias para el consumidor, el apoyo de la comunidad es importante. Podemos pedir a nuestros vecinos que no compren un cierto producto o que sólo compren en tiendas sindicalizadas que no estén en huelga. Los líderes y organizaciones comunitarias pueden ayudar a presionar a los patrones a tratar a sus empleados de manera justa.

Partes no sindicalizadas del mismo patrón

Cuando un patrón tiene unidades no sindicalizadas que pueden proporcionar los mismos bienes o servicios producidos por las unidades sindicalizadas, el poder de negociación de las unidades sindicalizadas está severamente dañado. En caso de una huelga, el patrón todavía puede operar y obtener ganancias de las partes no sindicalizadas de la compañía.

ORGANIZING AROUND WORKPLACE ISSUES

Total Time—2 hours

Learning Goals

- Explore the relationship between how members view our union and worksite organizing
- Consider different approaches for solving worksite problems
- Discuss situations where organizing around workplace issues makes sense
- Become familiar with a flow-chart tool that can help you decide how to solve problems
- Practice identifying issues that are appropriate for workplace organizing

Sections —Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. How Members Think About Themselves and Our Union—10 minutes
- III. Solving Worksite Problems: Different Approaches—25 minutes
- IV. “Turn it Around” Video & Discussion—30 minutes
- V. Solving Worksite Problems Chart—15 minutes
- VI. Selecting An Issue to Organize Around—30 minutes
- VII. Wrap-Up—5 minutes

Materials Needed

Flip Chart, Markers, Tape

Copies of the UFCW Steward Handbook

Copy of the “Turn it Around” DVD (available from the UFCW International Union’s Organizing Department)

DVD player/projector, Speakers, Screen/blank wall

Handouts/Worksheets

How Members View Our Union Handout

Problem Solving Options Worksheet

Solving Worksite Problems Chart

Mobilizing to Solve Problems—Sample Form

NOTES

I. Goals for the Training—5 mins



Post and review the goals for the training:

- Explore the relationship between how members view our union and worksite organizing.
- Consider different approaches for solving worksite problems.
- Discuss situations where organizing around workplace issues makes sense.
- Become familiar with a flow-chart tool that can help you decide how to solve problems.
- Practice identifying issues that are appropriate for workplace organizing.

II. How Members Think About Themselves and Our Union—10 mins



Distribute and review the How Members View Our Union handout.

Ask the participants, using a show of hands, whether diagram #1 or #2 best represents the views of the members at their worksite.

If the response is that most fit within diagram #2, explain that this is common.

Ask if there are times when the participants have encountered members who seem to fit more with diagram #1.

Note patterns in people's responses (i.e. when there is an issue that many members care about, then there's increased activity and communication, perhaps during bargaining and other times as well).

Ask the stewards what kinds of experiences they think might lead to the opposite—to members viewing our union as separate.

Note patterns in people's responses (i.e. "when nothing changes," "when we don't keep the members informed," etc).

Explain that the kinds of experiences members have as part of our union determines their views, as well as how they think about our union's power.

Module Icon Key



Flip Chart



Ideas



In Handbook



Worksheet/
Handout

The good news is that stewards can have a big impact in shifting this. How stewards approach our work can really help us to move towards diagram #1.



Explain that the rest of the workshop is going to explore different approaches to solving worksite problems, as this is one key way for members to experience collective power and to understand that they truly are the union.



Note that the diagrams just discussed are in the Steward Handbook.

III. Solving Workplace Problems: Different Approaches—25 mins

Observe that it's important for stewards to think about different approaches for solving worksite problems.



Distribute the Problem-Solving Options worksheet. Break the participants into small groups and ask them to read and discuss the different scenarios and to come back to the full group ready to report on the advantages and disadvantages of the different approaches. Explain that they have fifteen minutes for the exercise.



On multiple flip chart pages, create charts to record responses:

Scenario 1/Approach A: Advantages/Disadvantages
Scenario 2/Approach B: Advantages/Disadvantages

Bring everyone back together and call on different groups, asking for the advantages to Solution A and B for the scenarios, recording the responses.

Explain that all problem-solving approaches have advantages and disadvantages and that it's critical for stewards to consider a variety of options.

It's important for stewards to ask "How can I use worksite problems to build union power and involve members?"



IV. "Turn it Around" Video and Discussion—30 mins

Play the "Turn it Around" video.

Explain that while the DVD was produced by the Teamsters (a different union), the scenario it portrays—favoritism in work assignments—applies to many UFCW worksites as well.

Note: The video follows a story, pausing at different points, with questions for the participants. While you may decide to play the video all the way through, followed by discussion at the end, it's most effective to stop the video when the questions appear and to ask the group for their responses.

When the video concludes, ask if any of the participants have ever done something similar before at their current worksite or somewhere else. Ask

them to describe these worksite actions and whether they thought the approach was successful.

Note: In advance of the training, try to research a few examples of worksite organizing from the local or region to share. Often, people will have stories about collective actions (i.e. petitions or “marches on the boss”—during contract campaigns, etc) but may not think of it as “organizing around issues.” Try to draw out these experiences, as it’s important for the participants to be exposed to a variety of real-life examples.



Ask “Why would you choose to organize around a problem, even if you might be able to succeed solely through the grievance process?” Chart the responses.

Add the following, if not mentioned:

- Many members have not experienced what it feels like to be a part of collective action. Joining together to solve workplace problems is the best way for any of us to have a “union power” experience directly. Telling workers that “they are the union” may only seem like words until members can feel what this means, concretely.
- Organizing around issues increases our power—for future contract and organizing campaigns.
- The grievance process can take a long time. Organizing around issues can provide a more timely resolution.

V. Solving Worksite Problems Chart—15 mins



Distribute the handout A Steward’s Guide to Problem-Solving and explain that this chart provides a step-by-step road-map for approaching worksite issues.

Explain that the chart shows that we don’t have to choose between filing grievances and organizing around issues. Often, the best thing is to do both. Similarly, some problems are not appropriate for grievances, nor do they make sense to organize around. The chart allows for this as well. Note that all points on the chart lead to considering whether the issue might be something to raise during future contract negotiations. Observe that as we saw in the video, it’s often most effective to a) file a grievance, b) organize around an issue and c) try to address the issue during bargaining.

Ask what questions the participants have about the chart. Observe that it’s most useful as a tool when it’s referred to regularly. Suggest that the participants get in the habit of using the chart when faced with new (or existing) worksite problems.



Point out that the chart is also included in the Steward Handbook.

VI. Selecting An Issue to Organize Around—30 mins



Distribute the handout Mobilizing to Solve Problems—Sample Form.

Ask the participants to work in small groups to pick an issue that they can imagine organizing around.

Note: If the training participants are from different worksites, make sure that people from the same worksite come together for this exercise.

Explain that each group should begin by brainstorming current worksite problems and then select a problem to focus on, according to the questions on the handout.

Ask each group to select a reporter and explain that they have 15 minutes to complete the exercise.

Bring everyone back together and ask the groups to present the issues they selected and why.

VII. Wrap Up—5 mins

Conclude by encouraging the participants to follow-up by discussing their ideas with other members and with their union representatives.

Observe that the worksheets they began to complete during the last exercise are the beginnings of a worksite organizing plan.

Explain that steward trainings are most successful when the participants leave and try to put some of their plans into action.



Note that the Mobilizing to Solve Problems—Sample Form is also in the Steward Handbook.

HANDOUT: HOW MEMBERS VIEW OUR UNION

DIAGRAM # 1	DIAGRAM # 2
Union = Members/ Stewards	Union <hr/> Stewards Members
Members see that winning better conditions depends on them.	Members expect services for their dues.
When there is a problem, they ask what "we" are going to do about it.	When there is a problem members ask what is the "union" going to do about it.
Members see the stewards, staff and officers as leaders, not as people who will fix their problems.	Members think the steward's, staff and officer's job is to fix things for them.
Stewards, staff and officers discuss problems (and options for addressing them) with members.	It is difficult for members to learn about our union.

WORKSHEET: PROBLEM SOLVING OPTIONS

These are real situations faced by UFCW stewards. In your group, review and discuss both approaches and list the advantages and disadvantages for each.

SITUATION 1: DISRESPECTFUL SUPERVISOR

Since Jones became a supervisor a year ago, the number of suspensions has greatly increased. Jones is always on everyone, pushing them to work faster and harder. Whenever anyone questions him, Jones writes them up for insubordination. Top management likes Jones because he gets the work done with fewer people.

Approach A

Our union keeps filing grievances on all of the suspensions and writes another grievance charging Jones with harassment.

Approach A Advantages:

Approach A Disadvantages:

Approach B

Our union keeps filing grievances and also holds a meeting with all of the members who work under Jones, as well as the other stewards at the facility. They brainstorm what they can do and come up with the following steps:

Start a petition to Jones' boss and get as many names as possible protesting his actions.

Have everyone wear stickers that read "no harassment zone."

Send a delegation of stewards and members to top management and demand a meeting to talk about the problem with Jones.

Approach B Advantages:

Approach B Disadvantages:

A STEWARD'S GUIDE TO PROBLEM SOLVING

You hear about a problem.

You and the worker(s) investigate the problem.

Hold an informal meeting with the boss. Determine if you need to request information and/or conduct your own research. **Did you settle it?**

YES

All done.
Report
at next
meeting
or newsletter.

NO

Decide if it's a grievance.

YES

File the grievance.

Ask yourself:
"Is this an issue
we can
organize around?"

NO

Process the
grievance.

YES

Process the grievance
and create an
organizing plan.

NO

Ask yourself:
"Is it an important
issue anyway?
One we can
organize around?"

YES

Create an
organizing
plan.

NO

Explain to the
worker that
there is nothing
more to do
at this time.

Consider whether this is an issue to raise during future negotiations.

WORKSHEET: PROBLEM SOLVING OPTIONS

SITUATION 2: WORKING OUT OF TITLE

Supervisors frequently assign jobs to members that are outside their job description and threaten discipline for insubordination unless the member "obeys now and grieves later." Grievances are piling up, but the practice continues and members are wondering why it is taking so long for the situation to be resolved.

Approach A:

The union representative asks to meet with the Human Resources Director to persuade him of the negative impact of the inappropriate job assignments and the regular disciplinary slips on the morale of the workforce. He warns the HR Director that if it doesn't stop, there will continue to be a steady stream of grievances.

Approach A Advantages:

Approach A Disadvantages:

Approach B

All the stewards meet and decide to create forms entitled, "Assignment Despite Objection" (ADO). Whenever a member is given an inappropriate assignment, the steward helps the member to "write up" the supervisor. At the end of the first week, the stewards post, on the union bulletin board, a rating list of the supervisors, with negative points associated for each ADO.

Approach B Advantages:

Approach B Disadvantages:

Mobilizing to Solve Problems—Sample Form

Number of members in work area: _____

Issue: _____

Who cares about this issue?: _____

How many people are affected by this issue?: _____

Members already involved with this issue: _____

Members who would need to get involved: _____

Can this issue:

☐ Yes ☐ No Increase visibility of our union?

☐ Yes ☐ No Improve representation of underrepresented groups in our union?

☐ Yes ☐ No Be used to mobilize around?

How can pressure be exerted on:

Decision-makers in Management: _____

Outside decision-makers (government agencies, employer associations, public, etc.): _____

Remedy or Goal to be achieved: _____

DIAGRAMA # 1	DIAGRAMA # 2
Unión = Miembros/ Delegados	Unión <hr/> Delegados Miembros
Los miembros ven que obtener mejores condiciones depende de ellos.	Los miembros esperan servicios a cambio de sus cuotas.
Cuando hay un problema, ellos preguntan qué es lo que "nosotros" vamos a hacer al respecto.	Cuando hay un problema, los miembros preguntan qué es lo que la "unión" va a hacer al respecto.
Los miembros ven a los delegados, personal y funcionarios como líderes, no como personas que arreglarán sus problemas.	Los miembros piensan que el trabajo del delegado, personal y funcionario es arreglarles las cosas.
Los delegados, personal y funcionarios dialogan sobre los problemas (y opciones para abordarlos) con los miembros.	Es difícil para los miembros aprender sobre nuestra unión.

Estas son situaciones reales que enfrentan los delegados de UFCW. En su grupo, revise y discute sobre ambos enfoques y apunte las ventajas y desventajas de cada uno.

SITUACIÓN 1: SUPERVISOR IRRESPETUOSO

Desde que Jones se convirtió en supervisor hace un año, el número de suspensiones se ha incrementado enormemente. Jones siempre está apremiando a todos, forzándolos a trabajar más rápido y más duro. Cuando alguien lo cuestiona, Jones lo reporta por insubordinación. A la gerencia superior le agrada Jones, porque logra que el trabajo se haga con menos gente.

Enfoque A

Nuestra unión continúa presentando reclamaciones sobre todas las suspensiones y escribe otra reclamación acusando a Jones de acoso.

Enfoque A Ventajas:

Enfoque A Desventajas:

Enfoque B

Nuestra unión continúa presentando reclamaciones y también realiza una reunión con todos los miembros que trabajan bajo Jones, así como los otros delegados en las instalaciones. Hacen una lluvia de ideas sobre lo que pueden hacer y acuerdan los siguientes pasos:

Comenzar una petición al jefe de Jones y obtener el mayor número de nombres posible, que protesten por sus acciones.

Hacer que todos usen calcomanías que digan "zona libre de acoso".

Enviar a una delegación de delegados y miembros a la gerencia superior y solicitar una reunión para hablar sobre el problema con Jones.

Enfoque B Ventajas:

Enfoque B Desventajas:

GUÍA DEL DELEGADO PARA LA SOLUCIÓN DE PROBLEMAS

Escucha sobre un problema.

Usted y el(los) trabajador(es) investigan el problema.

Realiza una reunión informal con el jefe.
¿Llegó a un arreglo?

YES

Asunto
concluido.
Infórmelo en
la siguiente
asamblea o
en el periódico.

NO

Decida si es una queja.

YES

Presente la queja.

Pregúntese: ¿es
esto una
problemática
en torno a la que
podemos organizar?

NO

Procese
la queja.

YES

Procese la queja y
cree un plan
de organización.

NO

Pregúntese: ¿es esto
un asunto importante
de todas maneras?
¿Algo en torno a lo cual
podemos movilizar?

YES

Cree un
plan de
organización

NO

Dígale al trabajador
que no hay nada más
que ustedes
puedan hacer.

Considere si es éste un problema que habrá que plantear en futuras negociaciones.

SITUACIÓN 2: TRABAJO AJENO AL PUESTO

Los supervisores frecuentemente asignan a los miembros trabajos que están fuera de su descripción de puesto y amenazan con acción disciplinaria por insubordinación, a menos que el miembro "obedezca ahora y se queje después". Las reclamaciones se están acumulando, pero la práctica continúa y los miembros se están preguntando por qué se está tardando tanto en arreglarse la situación.

Enfoque A:

El representante de la unión solicita reunirse con el Director de Recursos Humanos para persuadirlo del impacto negativo que las asignaciones inapropiadas de trabajo y las tarjetas disciplinarias habituales tienen en la moral de la fuerza laboral. Él advierte al Director de RH que, si esto no para, continuará habiendo un flujo estable de reclamaciones.

Enfoque A Ventajas:

Enfoque A Desventajas:

Enfoque B

Todos los delegados se reúnen y deciden crear formularios titulados "Asignación Pese a Objeción" (APO). En cualquier momento en que a un miembro se le dé una asignación inapropiada, el delegado ayuda al miembro a "reportar" al supervisor. Al final de la primera semana, los delegados colocan, en el pizarrón de avisos de la unión, un listado de calificaciones de los supervisores, con puntos negativos asociados por cada APO.

Enfoque B Ventajas:

Enfoque B Desventajas:

Movilización para resolver problemas (ejemplo de formulario)

Núm. de trabajadores miembros en su área de trabajo: _____

Problema: _____

¿Para quién es importante este problema?: _____

¿Cuántas personas están siendo afectadas por este problema?: _____

Afiliados que ya están involucrados en este asunto: _____

Afiliados que necesitarían estar involucrados _____

¿Puede este asunto lograr lo siguiente?

☐ Sí ☐ No ¿Aumentar la visibilidad de la unión?

☐ Sí ☐ No ¿Mejorar la representación de los grupos con poca representación dentro de la unión?

☐ Sí ☐ No ¿Utilizarse para movilizar a la gente en torno a este problema?

¿Cómo puede ejercerse presión sobre los siguientes factores?

La gente que toma decisiones en la gerencia: _____

Los encargados externos de tomar decisiones (agencias gubernamentales, asociaciones patronales, opinión pública, etc.): _____

Remedio o meta a lograr: _____

INVESTIGATING AND WRITING GRIEVANCES

Total Time—2 hours

Learning Goals

- Review the definition of and types of grievances.
- Practice resolving problems informally.
- Understand how to effectively investigate grievances.
- Learn how to write grievances.

Sections—Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. What is a Grievance?—10 minutes
- III. Steps in the Grievance Process—5 minutes
- IV. Resolving Problems Informally—30 minutes
- V. Investigating Grievances—30 minutes
- VI. Using Open-Ended Questions—10 minutes
- VII. Writing Grievances—20 minutes
- VIII. Meeting with Management— 5 minutes
- IX. Wrap-Up—5 minutes

Materials Needed

Flip Chart, Markers, Tape
Five different colors of post-it notes
Copies of the Steward Handbook

Handouts/Worksheets

Resolving Grievances Informally
Grievance Fact Sheet
Using Open-Ended Questions
Sample Written Grievances
Grievance Handling Checklist

NOTES

I. Goals for the Training—5 mins

Post and review the goals for the training:

- Review the definition of and types of grievances.
- Practice resolving problems informally.
- Understand how to effectively investigate grievances.
- Learn how to write grievances.

II. What is a Grievance?—10 mins



Ask “what is a grievance?” Chart the responses.

Explain that the items listed can be categorized as violations of: (chart these categories).

- The contract
- Laws
- Company policy
- Past practice

Define each of the categories:

- **The contract.** Violations of language written in the collective bargaining agreement.
- **Laws.** Federal, state, or municipal laws including wages and hours, fair labor standards, equal opportunity, and civil rights. May also include “equal treatment”—laid out by laws and agencies such as the Americans with Disabilities Act, the Equal Employment Opportunity Commission and other widely accepted understandings of unequal treatment.
- **Company policy.** The employer’s personnel policies, work rules or administrative procedures.



- **Past practice.** Something that regularly, previously occurred. The right to grieve past practice violations may be affected by what specific contract language. Explain that there is more information pertaining to past practice grievances in the Steward Handbook.

Module Icon Key



Flip Chart



Ideas



In Handbook



Worksheet/
Handout

Ask for a volunteer to find and read the definition of a grievance in their contract (if participants have different contracts, ask for a few volunteers).

Explain that most grievances fall into two categories:

- Disciplinary grievances
- Contract violation grievances



Explain that regardless of which type of problem members are facing, we need to follow the chart in the Steward Handbook, A Steward's Guide to Problem Solving.

Observe that even when we reach the bottom right box on the chart, where it reads "Tell the worker that there is nothing more we can do at this time," it still might be possible to raise the issue during future contract negotiations.

Ask "what if the issue is truly not a workplace problem?" Note that, in some cases, our union may be able to refer members to a union-connected community services office that may be able to provide appropriate assistance. Suggest that the participants check with their union representatives in such situations.



Point out that additional information on what constitutes a grievance can be found in the Steward Handbook.

III. Steps in the Grievance Process—5 mins

Explain that most grievance procedures consist of a series of meetings or "steps" designed to give our union an opportunity to contest some decision or action taken by management (or for the company to defend its actions).

Usually, the first step is a meeting between the grievant and the grievant's immediate supervisor. In some contracts, the first step is "informal," meaning that the grievance does not have to be in writing. The last step in the process is almost always arbitration. Between the first step and arbitration, most contracts have one or more intermediate steps.

Generally, each step moves the dispute through the levels of management. If the second step is a meeting with the department head, for example, the third step might be a meeting with the company's administrator. Although the first step might not even be in writing, in almost all contracts, the grievance must be in writing after that.

Almost every contract outlines time limits for filing grievances, for management's response and for taking grievances from one step to the next.



A steward must know the time limits and be especially careful to meet deadlines. Failure to meet contractual time limits usually means that a

grievance can't be advanced to the next step, even if the situation is a very blatant contract violation.

Ask the participants to find the language in their contract(s) that pertains to step deadlines.

IV. Resolving Problems Informally—30 mins

Ask for examples of times when the participants (or others they know) have resolved problems informally (without filing written grievances) by talking with supervisors. Ask what went well in these situations and what could have been done differently.



Distribute and review the Resolving Grievances Informally Handout. Ask if the participants have any other tips or additions to the handout.

Explain that we're now going to practice (role-play) solving problems informally.



Read the following scenario (or another, based on your knowledge of the participants' worksites) and pre-chart the highlights for people to reference during the role-play exercise:

- Elsa was reprimanded by her supervisor, and given disciplinary points, for being late.
- She'd left her house in plenty of time, but the bus she takes to get to work was ten minutes late (it's usually on time).
- When she told her supervisor this, he said that she should plan better, and to be at the bus stop even earlier, in time for an earlier bus (so that even if it was late, she'd still be on time).
- Elsa explained that this isn't possible, as she needs to take her child to his bus right before she gets on hers.
- Elsa would like to have the disciplinary points removed.

Divide the participants into groups of three and ask them to select one person to play themselves (a steward), one to play Elsa and the other her supervisor. Explain that they'll have five minutes to prepare (the steward and Elsa) and then five minutes to role-play the conversation. Inform the participants when it's time to move through the different stages of the exercise.

Bring everyone back together to de-brief their experience. Were they able to resolve the issue informally (why/why not)? What did they do well? What might they do differently?



Observe that many grievances can be resolved informally and that this is a key role for stewards in our union.

V. Investigating Grievances—30 mins

Explain that even when we try our best, we still may not be able to solve problems informally.

Observe that while we need to try to gather as many facts as we can before any meeting with management, thorough investigations are most critical when preparing for a written grievance.



Ask if the participants have heard of the “5 W’s”. Chart the responses (who, what, when, where, why).

Break the participants into five groups and give each a stack of post-it notes (if possible, give the groups different colored post-its). Assign each group a W: Who, What, When, Where, Why.



Pre-chart a scenario of a potential grievance that fits well for the stewards in the training. Use one of these examples or write your own:

Cesar is assigned to light duty following a documented injury. While on light duty, he received a write up for poor job performance. Cesar has told his steward that he wants to file a grievance. What information do you need?

Cindy’s supervisor yelled at her while she was on the ham line. She left the line in tears. On her way out the door, she told the steward, “I want to file a grievance.” What information do you need?



Using the scenario on the chart, ask each group to brainstorm as many questions as they can for their “W”. Give the groups ten minutes for this exercise.

On a separate flip chart, write Who, What, When, Where, Why in one vertical column, on the left side of the flipchart.

Ask a representative from each group to post their questions on the flip chart next to the W they were assigned. Review and discuss the post-it notes with the participants.

Explain that, in addition to the 5 Ws, there is also an “R” that’s very important. The “R”, for remedy, represents how the grievant and other members want the problem to be settled. We can conduct a great investigation, but if we don’t know what the worker’s looking for, we won’t be able to proceed.

Explain the importance of taking good notes when investigating a grievance or with any of our other work as stewards. Ask what tools people currently use to take notes and suggest that they keep a notebook and pen with them at work.



Distribute and review the Grievance Fact Sheet handout.

Ask if there’s anything else that the participants would include during their investigations.



Explain that this handout is also in the Steward Handbook.

VI. Open-Ended Questions—10 mins

Observe that most of the questions that the groups brainstormed were open-ended, meaning that they cannot be answered with a yes or no.



Ask why open-ended questions are important when investigating grievances. If not mentioned, include:

- Open-ended questions allow for more details
- People may say yes or no based on what they think you'd like to hear

Distribute and review the Using Open-Ended Questions Handout.



VII. Writing Grievances—20 mins

Explain that well written grievances are often very brief—covering three basic points: (Pre-chart these.)



- What happened
- Why the problem is a grievance
- What we want management to do to about it.

Pre-chart the following example of a written grievance:



DATE: May 2, 2013

FROM: A. Union Steward

TO: Manny Manager

On or about May 1, 2013, management unjustly reprimanded Ms. Jane Hardworker.

This violates Article IV, Section 9, and all other relevant Articles of the contract.

The Union demands that management immediately revoke the reprimand, remove all references to the discipline from Ms. Hardworker's record, and make her whole in every other way.

Ask what the participants notice about the words used in this example.

If not mentioned, note the importance of using catchall phrases (i.e. “all other relevant Articles” and “make her whole in every other way”) to insure that all articles of the contract and possible remedies are included.

Distribute and review the Sample Written Grievances Handout.



If time allows, prior to distributing the handout, chart one or more of the scenarios on the handout and ask the participants to practice writing them up as grievances (in pairs or small groups).

VIII. Meeting with Management—5 mins

Ask if anyone's met with management as part of a grievance process. Ask them to describe their experience.

Ask what tips people have for such meetings. Stress the importance of preparation—both for the steward and for the grievant.



Explain that there is more information on meeting with management—including what to do if the employer says “no,” in the Steward Handbook.

IX. Wrap-Up—5 mins



Distribute and review the Grievance Handling Checklist handout.

Point out that the checklist is also in the Steward Handbook.



HANDOUT: RESOLVING PROBLEMS INFORMALLY

BEFORE AN INFORMAL DISCUSSION WITH MANAGEMENT:

- Find out what the involved member(s) want and what they would settle for.
- Explain to the member(s) involved that this is a chance to work things out before a grievance is written.
- Anticipate what management is likely to say, and think about how to respond.
- Decide what the member(s) involved will say during the discussion and explain that it's often best for the steward to do most of the talking.
- Based on how the supervisor has acted in the past, determine what seems best in terms of your approach with management.

AT THE INFORMAL DISCUSSION:

- Set the right tone for a calm, non-confrontational conversation.
- Explain that your goal is to see if the issue can be resolved informally (without writing a grievance).
- Remind management that by resolving issues early, they can avoid further employee dissatisfaction.
- If management issues discipline, ask them to explain why.
- Listen.
- If necessary, caucus with the member(s) privately, before continuing the discussion.
- In some cases, ask the member(s) to explain what happened and/or their feelings about the case.
- Point out the strengths of our union's position and weaknesses in management's.

DETERMINE IF MANAGEMENT IS OPEN TO A SETTLEMENT. IF YES:

- Try to find out what settlements the supervisor might agree to.
- Don't make any agreements without talking with the impacted member(s) first and getting their approval.
- When you reach a settlement, make sure that everyone affected understands the agreement.
- Put the settlement in writing if it is complicated or if it will be helpful (to reference the agreement) in the future.

IF MANAGEMENT IS NOT OPEN TO A SETTLEMENT:

- Don't keep arguing.
- Learn as much as you can about management's position.
- Take notes after the meeting, especially about management's version of what occurred.
- Make sure that you understand management's position.
- Inform management that our union may file a grievance and end the meeting.

Grievance Fact Sheet

(This sheet is not intended to go to management. It is only for our union's investigation of grievances. It should be kept in the union's files.)

Grievant Name _____

Department _____

Job _____

Date of hire _____

Phone _____

WHO (workers) is involved? _____

WHO from management is involved? _____

WHAT happened? (If there was an incident, **WHERE**, **WHEN**, and **WHO** saw it?) _____

WHAT else is important to this case? (Grievant's record, other history of the problem, questions of "just cause", management's position, etc.?)

WHY is this a grievance? (contract violation, past practice, company rules, laws?) _____

WHAT do we want the company to do to make it right? _____

Steward _____

Date _____

HANDOUT: USING OPEN-ENDED QUESTIONS

GETTING STARTED

"Tell me what happened."

"What do you think management will say happened?"

"What do you have in writing about what happened?"

"Why do you think this happened?"

CLARIFYING

"How do you know that?"

"Can you give me an example of what you mean?"

"Why did you do that?"

GETTING THE SPECIFICS

"What time was it when that happened?" "How do you know?"

"How many times did it happen?"

"What were the exact words used?"

"Tell me the order in which things happened."

"Who saw what happened?" "Who else should I talk to?"

PULLING IT TOGETHER

"What else should I know?"

"What do you want?" "What will resolve this?"

"Here's what I heard so far, can you tell me what I left out?"

HANDOUT: SAMPLE WRITTEN GRIEVANCES

WHAT HAPPENED

Kevin Jones, produce coordinator at Market Fresh, worked 45 hours last week but received only 40 hours pay.

HOW IT WAS WRITTEN UP

"Kevin Jones received only 40 hours pay for the 45 hours he worked during the week of July 7. This violates Article 9, Hours and Overtime, and all other relevant articles of the contract. Kevin Jones should be made whole including, but not limited to, being paid for five hours at time and a half."

WHAT HAPPENED

Without any notification from management, the Company increased the chain speed on the picnic ham line in the Pork Department without adding extra crew.

HOW IT WAS WRITTEN UP

"The union grieves the increased chain speeds in the Pork Department on October 28 and October 30 when the speeds ran over the established speed/crew ratio. This action violates Article XVII, Workloads; all relevant articles of the contract as well as the Company's written health and safety policy; the Company's past practice of maintaining correct chain speed/crew ratios; and the State and Federal OSHA guidelines. Management should make all affected employees whole including, but not limited to, compensation for the additional workload, and the Company should follow established health and safety requirements."

HANDOUT: GRIEVANCE HANDLING CHECKLIST

A MEMBER WITH A POTENTIAL GRIEVANCE

- Talk to member as soon as possible.
- Let member tell the story.
- Listen attentively. Do not interrupt. Create a positive and sympathetic atmosphere.
- Take notes.
- When member finishes the story, ask questions.
- Get details, names of witnesses and types of documents the member believes will help with the grievance.
- Discuss what member wants. Explain the possible and realistic remedies. Inform members of strengths and weaknesses of the grievance.
- Recap your understanding about what the grievance is and the settlement sought.

FILE GRIEVANCE

- Check the contract's filing time limit.
- Write grievance citing as many contract provisions as possible and describing facts as generally as possible.
- Within the contract's time limit, file the grievance.

INVESTIGATE THE GRIEVANCE

- Investigate with an open mind. Do not personalize issues or prejudge the grievance's merits. Maintain an objective attitude.
- Review relevant contract provisions and company policies or rules.
- Interview the member and the member's witnesses. Then, interview the company's witnesses. Take notes.
- In past practice cases, identify as many examples of the practice as possible. Obtain first-hand accounts.
- Request all relevant information and documents from company.

WHILE PROCESSING THE GRIEVANCE

- Answer the member's calls and questions.
- Involve the member as much as possible in grievance meetings.
- Regularly inform the member of the status of the grievance, including what occurred at grievance meetings and of upcoming grievance steps. Do so as soon as possible.
- Coordinate with union representatives.
- Continually update the member on what is happening with the grievance.

ANTES DE UNA DISCUSIÓN INFORMAL CON LA GERENCIA:

- Averigüe que es lo que desean el o los miembros involucrados y con qué se conformarían.
- Explique al miembro o miembros involucrados que ésta es una oportunidad de arreglar las cosas antes de que se escriba una reclamación.
- Prepárese para lo que posiblemente dirá la gerencia, y piense cómo responder.
- Decida lo que el o los miembros involucrados dirán durante la plática y explique que frecuentemente es mejor que el delegado sea quien hable más.
- Con base en cómo ha actuado anteriormente el supervisor, determine qué podría funcionar mejor, en cuanto a cómo dirigirse a la gerencia.

EN LA DISCUSIÓN INFORMAL:

- Establezca el tono adecuado para una conversación calmada, no desafiante.
- Explique que su meta es ver si el asunto se puede resolver informalmente (sin escribir una reclamación).
- Recuérdele a la gerencia que al resolver los asuntos pronto, se puede evitar insatisfacción adicional de los empleados.
- Si la gerencia emite una acción disciplinaria, pídale que le expliquen la razón.
- Escuche.
- Si es necesario, reúnase con el o los miembros de forma privada, antes de continuar la plática.
- En algunos casos, pida al o los miembros que expliquen lo que pasó y/o sus sentimientos sobre este caso.
- Señale las fortalezas de la posición de nuestra unión y las debilidades en la posición de la gerencia.

DETERMINAR SI LA GERENCIA ESTÁ DISPUESTA A ACEPTAR UN ARREGLO. EN CASO AFIRMATIVO:

- Intente averiguar qué arreglos podría aceptar el supervisor.
- No realice ningún acuerdo sin hablar primero con el o los miembros afectados y obtener su aprobación.
- Cuando usted haya llegado a un acuerdo, asegúrese que todos los afectados entiendan el acuerdo.
- Escriba el acuerdo si es complicado o si será útil (para usar el acuerdo como referencia) en el futuro.

SI LA GERENCIA NO ESTÁ DISPUESTA A ACEPTAR UN ARREGLO:

- No siga discutiendo.
- Aprenda todo lo que pueda sobre la posición de la gerencia.
- Tome notas después de la reunión, especialmente de la versión de la gerencia sobre lo que ocurrió.
- Asegúrese de que usted entiende la posición de la gerencia.
- Informe a la gerencia que nuestra unión podría presentar una reclamación y finalice la reunión.

Hoja de datos de la queja

(No se pretende que esta hoja vaya a la gerencia. Sólo debe ser usada por la unión para la investigación de las quejas. Debe conservarse en el expediente de la unión.)

Nombre del reclamante: _____

Departamento: _____

Ocupación: _____

Fecha de contratación: _____

Teléfono: _____

¿QUIÉN(ES) (trabajadores) está(n) involucrado(s)? _____

¿QUIÉN(ES) de la gerencia está(n) involucrado(s)? _____

¿QUÉ pasó? (Si hubo un incidente, ¿DÓNDE, CUÁNDO Y QUIÉN lo vio?) _____

¿QUÉ más es importante para este caso? (Historial del agraviado, otra crónica del problema, cuestiones de “causa justificada”, la posición de la gerencia, etcétera.) _____

¿POR QUÉ esto constituye un agravio? (¿Violación del contrato, práctica anterior, normas de la empresa, leyes?) _____

¿QUÉ queremos que la empresa haga para corregir esto? _____

Delegado: _____

Fecha: _____

PRIMEROS PASOS

"Dígame lo que pasó".

"¿Qué cree que dirá la gerencia que pasó?"

"¿Qué tiene por escrito sobre lo que pasó?"

"¿Por qué cree que pasó esto?"

CLARIFICAR

"¿Cómo sabe eso?"

"¿Me puede dar un ejemplo de lo que quiere decir?"

"¿Por qué hizo usted eso?"

OBTENER INFORMACIÓN ESPECÍFICA

"¿Qué hora era cuando pasó eso?" "¿Cómo lo sabe?"

"¿Cuántas veces sucedió?"

"¿Cuáles fueron las palabras exactas que usaron?"

"Dígame en qué orden sucedieron las cosas".

"¿Quién vio lo que pasó? "¿Con quién más debería hablar?"

CONSOLIDAR LA INFORMACIÓN

"¿Qué más debería saber?"

"¿Qué es lo que usted desea?" "¿Con qué se resuelve esto?"

"Esto es lo que he escuchado hasta ahora, ¿me puede decir qué es lo que me falta?"

QUÉ PASÓ

Kevin Jones, coordinador de frutas y verduras en Market Fresh, trabajó 45 horas la semana pasada, pero sólo recibió pago por 40 horas.

CÓMO SE ESCRIBIÓ

"Kevin Jones recibió pago por sólo 40 horas de las 45 horas que él trabajó durante la semana del 7 de julio. Esto viola el Artículo 9, Horarios y Tiempo Extra, y todos los otros artículos relevantes del contrato. Kevin Jones debería ser compensado mediante, entre otros, el pago de cinco horas a una tasa de prima del 150% del salario normal".

QUÉ PASÓ

Sin ninguna notificación de la gerencia, la Compañía incrementó la velocidad de la cadena en la línea de jamón para día de campo en el Departamento de Cerdos, sin agregar personal extra.

CÓMO SE ESCRIBIÓ

"La unión reclama los incrementos en la velocidad de la cadena en el Departamento de Cerdos el 28 de octubre y el 30 de octubre, cuando las velocidades excedieron la relación de velocidad/cuadrilla establecida. Esta acción viola el Artículo XVII, Carga de trabajo; todos los artículos relevantes del contrato, así como la política escrita de salud y seguridad de la Compañía; la práctica anterior de la Compañía de mantener relaciones de velocidad/cuadrilla correctas; y los lineamientos estatales y federales de OSHA. La gerencia debería compensar a todos los empleados afectados mediante, entre otros, una compensación por la carga de trabajo adicional, y la Compañía debería seguir los requerimientos establecidos de salud y seguridad."

UN MIEMBRO CON UNA POSIBLE RECLAMACIÓN

- Hable con el miembro tan pronto como sea posible.
- Deje que el miembro le cuente su historia.
- Escuche con atención. No interrumpa. Establezca una atmósfera positiva y comprensiva.
- Tome notas.
- Cuando el miembro termine de contar su historia, hágale preguntas.
- Obtenga detalles, nombres de testigos, y tipos de documentos que el miembro considera que ayudarán a la reclamación.
- Dialogue sobre lo que el miembro desea. Explique las compensaciones posibles y realistas. Informe a los miembros sobre las fortalezas y debilidades de la reclamación.
- Resuma lo que usted entendió sobre el asunto de la reclamación y el acuerdo buscado.

PRESENTAR LA RECLAMACIÓN

- Revise el tiempo límite para presentarla de acuerdo al contrato.
- Escriba la reclamación citando tantas estipulaciones del contrato como sea posible y describa los hechos de forma tan general como sea posible.
- Presente la reclamación dentro del tiempo límite estipulado en el contrato.

INVESTIGAR LA RECLAMACIÓN

- Investigue manteniendo la mente abierta. No personalice los asuntos o prejuzgue los méritos de la reclamación. Mantenga una actitud objetiva.
- Revise estipulaciones relevantes del contrato y políticas o reglamentos de la compañía.
- Entreviste al miembro y a sus testigos. Luego, entreviste a los testigos de la compañía. Tome notas.
- En los casos de prácticas anteriores, identifique la mayor cantidad posible de ejemplos de la práctica. Obtenga relatos de primera mano.
- Solicite a la compañía toda la información y documentos relevantes.

AL PROCESAR LA RECLAMACIÓN

- Responda a las llamadas y preguntas del miembro.
- Involucre al miembro tanto como sea posible en las reuniones sobre la reclamación.
- Informe frecuentemente al miembro sobre el estado de la reclamación, incluyendo lo que ocurrió en las reuniones sobre la reclamación y los siguientes pasos de la reclamación. Hágalo tan pronto como sea posible.
- Coordínese con los representantes de la unión.
- Actualice continuamente al miembro sobre lo que está pasando con la reclamación.

THE LEGAL RIGHTS OF UNION STEWARDS

Total Time—2 hours

Learning Goals

- Learn more about the legal rights of unions stewards.
- Consider the legal responsibilities of union stewards.
- Practice explaining these rights and responsibilities to co-workers.

Sections—Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. Legal Protections of Union Stewards—30 minutes
- III. Legal Rights of Union Stewards Quiz—40 minutes
- IV. Stewards Who are Immigrants/ Representing Immigrant Workers—10 minutes
- V. Weingarten Rights: Overview—5 minutes
- VI. Weingarten Rights: Role-Play—20 minutes
- VII. Duty of Fair Representation—10 minutes

Materials Needed

Flip Chart, Markers, Tape
Internet Connection
Laptop, Projector, Speakers and Screen/Blank Wall
Copies of the Steward Handbook

Handouts/Worksheets

Your Rights as a Union Steward Quiz Worksheet
Your Rights as a Union Steward Quiz Answers Handout
Legal Protections Handout

NOTES**I. Goals for the Training—5 mins**

Post and review the goals for the training:

- Learn more about the legal rights of union stewards.
- Consider the legal responsibilities of union stewards.
- Practice explaining these rights and responsibilities to co-workers.

II. Legal Protections of Union Stewards—30 mins

Explain that the rights of union stewards are protected by our contract and by labor law—the National Labor Relations Act (NLRA). Our rights under the contract are enforced through our grievance and arbitration process and our rights under the NLRA are enforced through the National Labor Relations Board (NLRB).



Break the participants into four groups. Assign each group **one of the four** numbered legal protections on the handout: No Retaliation/Discrimination, Equality Rule, Equal Standard and Legal Right to Information.

Explain that each group has 15 minutes to familiarize themselves with the information for the number they're assigned and to develop a quick and interesting way to present the information to the other participants.

They can create a skit or “dramatization” that illustrates the information or a drawing or other artwork on a flip chart page, etc.

After giving the groups a two minute warning, bring everyone back together for the four presentations, encouraging questions/discussion after each.



Point out that the information we just reviewed is covered starting on page 29 of the Steward Handbook.

III. Legal Rights of Union Stewards Quiz—40 mins

“Distribute the Legal Rights of Union Stewards Quiz” worksheet and ask the participants to work in small groups, reading and answering the questions together. Ask each group to select a reporter and explain that they'll have 20 minutes to complete the quiz.

Module Icon Key

Flip Chart



Ideas



In Handbook



Worksheet/
Handout



In advance of the report-backs, write the numbers 1-9 vertically on a flip chart. When it's time, give the groups a two minute warning and bring them back together for discussion.

Starting with the first question on the quiz, ask the group if they'd come up with yes or no for each number (write "Y" or "N" next to the numbers on the chart). For questions where there's disagreement, write a "?" on the chart.

Focus the discussion on the questions with a "?."



Distribute the "Your Rights as a Steward" worksheet that contains the answers to the quiz.

IV. Stewards Who Are Immigrants/ Representing Immigrant Workers—10 mins

Explain that immigrant workers have always been at the forefront of organizing unions. We also know that management can try to intimidate immigrant workers so that they don't speak up or become involved in our union.

Ask the group: Are stewards who are immigrants protected by the same legal rights as other stewards? Answer: Yes.

Explain that all federal laws which protect employees in the workplace protect immigrant workers as well. The National Labor Relations Act (NLRA) provides that an employee, whether documented or not documented, has the right to form, join, and assist a union and to bargain collectively with their employer through the union. This means that regardless of the employee's immigration status, workers can join together to talk about and attempt to make changes in wages, hours of work, and other employment conditions.

Under the NLRA, our union has the same obligation to represent immigrant workers as other workers and owes them the same duty of fair representation. As the union is obligated to represent all workers in the bargaining unit, an immigrant worker's particular status is usually not relevant to a steward's daily representation duties.

Employers may target immigrant workers during a labor dispute, such as during a strike, contract negotiations, investigating unfair labor practice charges, and investigating alleged violations of other laws. This targeting of immigrant workers may happen regardless of the workers' documentation status, and may play on workers' fears of threats, retaliation and deportation. You should be aware that such threats and other retaliation for asserting federal rights are illegal, and inform your union representative about a possible grievance or additional charges.

NOTES



Point out that page 45 in the Steward Handout covers the rights of immigrant workers in more detail.

V. Weingarten Rights: Overview—5 mins



Pre-chart the following:

If this discussion, meeting or telephone call could in any way be related to my being disciplined or terminated or affect any of my working conditions, I exercise my federal rights and hereby request that a steward of my choice be present. Without that steward's presence, I choose not to participate in this discussion or meeting. Please do not request that I waive this right. I will not.

Ask if anyone's ever heard of "Weingarten Rights." Explain that the rule on the flip-chart is often referred to as "Weingarten" because it was established by a Supreme Court decision in 1975 called Weingarten vs. NLRB. It ensures that workers are not intimidated or coerced during closed-door sessions with management.



Explain that because workers need to know that they have this right in order to exercise it, teaching other members about Weingarten is an important role for union stewards.

VI. Weingarten Rights: Role Plays—20 mins

Ask for volunteers to role-play the following scenarios in front of the group (one pair of volunteers can try the first scenario and another pair the second):

- Explain to a member what they should do if they're asked to come to a meeting that seems like it might be disciplinary. This scenario requires two characters: a member and a steward.
- Explain to management that, as a steward, you'll be accompanying a member to a meeting that appears to be disciplinary. This scenario requires two characters: a steward and someone from management.

After each role-play, applaud the actors and thank them for volunteering. Ask them, and then the rest of the group, if they have other ideas about how to approach similar situations.



Mention that there is more information about Weingarten Rights starting on page 32 in the Steward Handbook.

VII. Duty of Fair Representation—10 mins

Explain that along with legal protections, union stewards also have legal responsibilities. Ask if anyone's heard of the Duty of Fair Representation (DFR) and ask them to explain what it is.

THE LEGAL RIGHTS OF UNION STEWARDS

NOTES

Provide an overview of DFR:

Once workers elect a union, the union becomes legally certified as the exclusive bargaining representative for all employees in the bargaining unit.

Courts have ruled that this right to exclusive representation carries with it a duty to fairly represent all employees, members and non-members alike. This means the union is obligated to listen to and consider potential grievances raised by all workers in the bargaining unit, without discrimination or favoritism.

If a worker believes the union has failed to provide fair representation, they have the right to file a labor board charge against the union, often called a “DFR” claim or charge.

The duty of fair representation does not mean that stewards are required to be perfect or to always be right—it just requires that we do our best to be thorough and fair.

Similarly, we do not need to take every grievance all the way through to arbitration, but we do need to make the decisions about which grievances we take further in fair manner, based on the merits of each case.

Ask for and discuss questions the participants may have about DFR.



Point out that more information about DFR can be found starting on page 34 of the Steward Handbook.

HANDOUT: LEGAL PROTECTIONS

1. Equality rule

When you interact with management as a steward, you do so as an equal.

This means you have the right to openly disagree, question, and argue with management when necessary without being disciplined. Labor law recognizes that a steward cannot effectively represent workers unless they are able to freely communicate with management as equals.

2. No retaliation or discrimination

Labor law and your contract prohibit management from disciplining or intimidating you because of your activity as stewards. For example, management cannot deny you promotions or other benefits, assign you extra work or undesirable jobs, or act in other ways that attempt to discourage you from doing your job as a steward.

3. Equal standard rule

It is illegal and a violation of the contract for management to hold you to a higher standard than other workers or to harass you with extra supervision or stricter rules. As a steward, you should expect co-workers to look to you as an example—and you can protect yourself and the union's reputation by doing your job well. But being a steward does not allow management to expect more from you or to discipline you.

4. Legal right to information

By law, we, as the union, have a broad right to receive relevant information from management at any stage of the grievance process, including investigations to determine whether a grievance exists. Management must provide you with this information upon request—this is considered part of management's "duty to bargain."

WORKSHEET: YOUR RIGHTS AS A UNION STEWARD QUIZ

Answer the following questions the best you can. This is not a test and is for your reference. After you finish the quiz we'll discuss the questions.

1. You are the steward representing a member at a grievance meeting. At the meeting, your supervisor refers to you and the member by your first names. At work you usually refer to your supervisor as Mr. Smith. At this meeting, you decide to call him by his first name. Do you have a right to do this?
2. While doing your steward job of interviewing a supervisor to investigate a grievance, you say you think the supervisor is "bending the truth." Does the supervisor have a right to discipline you for making that comment?
3. While you are working, your supervisor tells you to "move it." In a loud voice you reply, "screw you." Is your comment protected?
4. Management announces that it is closing part of the operation. On your break, you and a few members go to the manager's office and tell him that if he doesn't hold off and talk to the union first he can expect lawsuits, unfair labor practices, grievances and a whole lot of protests. He says, "If you threaten me again, you'll be fired." Is he within his rights?
5. At a labor management meeting to discuss a controversial issue, the discussion gets very heated. Management calls you, the steward, an unreasonable "hard head." You say, "I will personally kick your @#% out in the parking lot." Is that comment within your rights to say?
6. A member who always goes his own way and has never been involved with our union gets a 3-day suspension for absenteeism. You don't really know his attendance record, but have the impression that it's pretty bad. He asks you to file a grievance on the suspension. You say, "So, now you need the union? We might just not have time to help you on this one because we are busy with real union members." Is this within your rights as a steward?
7. You ask management to see the time cards of all the employees on the night shift on a specific day last week. Management says these are private and that you can't see them. Do you have a right to see the time cards?
8. The supervisors put out a new rule that everyone hates. As the steward, you start collecting signatures on a petition against the new rule. You do this on your own time and only ask members to sign at times when they are also not working. A supervisor takes you aside and tells you, "If I were you, I wouldn't be making waves on this one, it could cost you." Is this a violation of your steward's rights?
9. A member who was just fired wants to meet with you. Your work is not particularly busy and you tell your supervisor that you are leaving your work area to meet with a member on union business. Your supervisor says, "Forget it, the company pays you for working. Wait until you are off the clock and then have your meeting." Is this a violation of your rights as a steward?

WORKSHEET: YOUR RIGHTS AS A UNION STEWARD QUIZ ANSWERS

1. You are the steward representing a member at a grievance meeting. At the meeting, your supervisor refers to you and the member by your first names. At work you usually refer to your supervisor as Mr. Smith. At this meeting, you decide to call him by his first name. Do you have a right to do this?

Yes, when you are doing union business in your role as a steward, you are equal to your supervisor. If he is using first names, you can use his first name. You can also insist that you be addressed as Mr., Mrs., Miss, Ms. The key here is that whichever way you and the supervisor address each other, it should be equal.

2. While doing your steward job of interviewing a supervisor to investigate a grievance, you say you think the supervisor is "bending the truth." Does the supervisor have a right to discipline you for making that comment?

No, you have the right to question the truthfulness of management when you are performing union duties as a steward.

3. While you are working, your supervisor tells you to "move it." In a loud voice you reply, "screw you." Is your comment protected?

Not by the rule that protects steward's rights. You were not performing union functions as a steward when this happened.

4. Management announces that it is closing part of the operation. On your break, you and a few members go to the manager's office and tell him that if he doesn't hold off and talk to the union first he can expect lawsuits, unfair labor practices, grievances and a whole lot of protests. He says, "If you threaten me again, you'll be fired." Is he within his rights?

No, as a steward performing union functions, you have the right to tell management what the union might do in response to management's actions. Note that all the things mentioned are legal. Threatening illegal actions may not be protected and would not be a good idea anyway.

5. At a labor management meeting to discuss a controversial issue, the discussion gets very heated. Management calls you, the steward, an unreasonable "hard head." You say, "I will personally kick your @#% out in the parking lot." Is that comment within your rights to say?

No, the cursing alone is usually protected, but combined with the threat of violence the comments are "outrageous" and "indefensible."

6. A member who always goes his own way and has never been involved with our union gets a 3-day suspension for absenteeism. You don't really know his attendance record, but have the impression that it's pretty bad. He asks you to file a grievance on the suspension. You say, "So, now you need the union? We might just not have time to help you on this one because we are busy with real union members." Is this within your rights as a steward?

No, under the Duty of Fair Representation, you must treat all cases seriously and equally regardless of who is involved. You must investigate the case before making any statements or judgments on the strength or weakness of the case.

WORKSHEET: YOUR RIGHTS AS A UNION STEWARD QUIZ ANSWERS

7. You ask management to see the time cards of all the employees on the night shift on a specific day last week. Management says these are private and that you can't see them. Do you have a right to see the time cards?

Most likely yes. As long as the time cards are relevant to your job of investigating and handling grievances; you should be able to see them.

8. The supervisors put out a new rule that everyone hates. As the steward, you start collecting signatures on a petition against the new rule. You do this on your own time and only ask members to sign at times when they are also not working. A supervisor takes you aside and tells you, "If I were you, I wouldn't be making waves on this one, it could cost you." Is this a violation of your steward's rights?

Yes, even though the supervisor's remarks are somewhat unclear, they would make reasonable stewards feel like they were being threatened with some kind of adverse action for doing protected union activity on their own time.

9. A member who was just fired wants to meet with you. Your work is not particularly busy and you tell your supervisor that you are leaving your work area to meet with a member on union business. Your supervisor says, "Forget it, the company pays you for working. Wait until you are off the clock and then have your meeting." Is this a violation of your rights as a steward?

It depends on what your contract says. While the law gives you the right to represent members who have been disciplined, it does not give you the right to do so on work time. Most contracts, however, give stewards the right to handle grievances on work time subject to reasonable restrictions.

1. Principio de igualdad

Cuando usted interactúe con la gerencia como delegado, debe hacerlo como un igual.

Esto significa que usted tiene el derecho a mostrarse abiertamente en desacuerdo, cuestionar y discutir con la gerencia cuando sea necesario, sin ser disciplinado. La ley laboral reconoce que un delegado no puede representar de manera efectiva a los trabajadores, a menos que sea capaz de comunicarse libremente con la gerencia como su igual.

2. No represalias o discriminación

La ley laboral y su contrato prohíben que la gerencia los discipline o intimide debido a su actividad como delegados. Por ejemplo, la gerencia no puede negarle ascensos u otros beneficios, asignarle trabajo extra o puestos indeseables, o actuar de otras formas que intenten desalentarlo de realizar su tarea como delegado.

3. Principio de criterios equitativos

Es ilegal y una violación al contrato que la gerencia lo califique usando criterios más altos que los de otros trabajadores o que lo acosen con supervisión extra o reglas más estrictas. Como delegado, usted debe esperar que sus compañeros de trabajo lo tomen como ejemplo, y usted puede protegerse a sí mismo, y a la reputación de la unión, realizando bien su trabajo. Pero ser un delegado no le otorga permiso a la gerencia a esperar más de usted o a disciplinarlo.

4. Derecho legal a la información

Por ley, nosotros, como unión, tenemos un derecho amplio a recibir información relevante de parte de la gerencia en cualquier etapa del proceso de reclamación, incluyendo investigaciones para determinar si existe una reclamación. La gerencia debe proporcionarle esta información cuando usted la pida; esto se considera parte de la "obligación de negociar" de la gerencia.

HOJA DE TRABAJO: PRUEBA SOBRE SUS DERECHOS COMO DELEGADO DE LA UNIÓN

Responda a las siguientes preguntas lo mejor que pueda. Esto no es un examen y es para su referencia. Después de que termine la prueba, hablaremos sobre las preguntas.

1. Usted es el delegado que representa a un miembro en una reunión de reclamación. En la reunión, su supervisor se refiere a usted y al miembro usando sus nombres de pila. En el trabajo, usted normalmente se refiere a su supervisor como Sr. Smith. En esta reunión, usted decide llamarlo por su nombre de pila. ¿Tiene usted derecho a hacerlo?
2. Mientras realiza su trabajo como delegado de entrevistar a un supervisor para investigar una reclamación, usted dice que piensa que el supervisor está "tergiversando la verdad". ¿Tiene el supervisor derecho de disciplinarlo por hacer ese comentario?
3. Mientras usted está trabajando, su supervisor le dice "muévete". En voz alta, usted responde "jódase". ¿Está protegido su comentario?
4. La gerencia anuncia que está clausurando parte de la operación. Durante el descanso, usted y unos cuantos miembros van a la oficina del gerente y le dicen que si no se espera y habla primero con la unión, puede prever demandas judiciales, prácticas laborales injustas, reclamaciones y un montón de protestas. Él dice: "Si me amenaza nuevamente, será despedido". ¿Está él en su derecho?
5. En una reunión entre trabajadores y gerencia para dialogar sobre un asunto controversial, la plática se torna muy acalorada. La gerencia le llama a usted, el delegado, un "testarudo" irrazonable. Usted dice: "Yo personalmente le voy a romper la @#% en el estacionamiento". ¿Está este comentario entre lo que tiene derecho a decir?
6. Un miembro que siempre anda por su lado y nunca se ha involucrado en nuestra unión recibe una suspensión de tres días por ausentismo. Usted no conoce realmente su registro de asistencia, pero tiene la impresión de que es muy malo. Él le pide a usted que presente una reclamación por la suspensión. Usted le dice: "Ah, ¿así que ahora usted necesita de la unión? Nosotros posiblemente no tengamos tiempo para ayudarlo con ésta, porque estamos ocupados con los miembros de verdad de la unión". ¿Es esto parte de sus derechos como delegado?
7. Usted debe pedir a la gerencia ver las tarjetas de asistencia de todos los empleados del turno nocturno de un día específico de la semana pasada. La gerencia dice que son privadas y que usted no puede verlas. ¿Tiene usted derecho a ver las tarjetas de asistencia?
8. Los supervisores pusieron una nueva regla que todo mundo odia. Como delegado, usted comienza a recabar firmas para una petición contra la nueva regla. Usted hace esto en sus horas libres y sólo pide a los miembros que firmen en momentos en los cuales ellos tampoco están trabajando. Un supervisor lo lleva aparte y le dice: "Si yo fuera usted, no estaría alborotando por ésta, le podría costar a usted". ¿Es esto una violación a sus derechos de delegado?
9. Un miembro que acaba de ser despedido quiere reunirse con usted. Su carga de trabajo no es especialmente fuerte y usted le dice a su supervisor que se saldrá del área de trabajo para reunirse con un miembro para asuntos de la unión. Su supervisor dice: "Olvídelo, la compañía le paga por trabajar. Espere hasta que salga de trabajar y entonces tenga su junta". ¿Es esto una violación a sus derechos como delegado?

1. Usted es el delegado que representa a un miembro en una reunión de reclamación. En la reunión, su supervisor se refiere a usted y al miembro usando sus nombres de pila. En el trabajo, usted normalmente se refiere a su supervisor como Sr. Smith. En esta reunión, usted decide llamarlo por su nombre de pila. ¿Tiene usted derecho a hacerlo?

Sí, cuando usted está realizando tareas de la unión en su papel como delegado, usted es igual a su supervisor. Si él está usando nombres de pila, usted puede usar su nombre de pila. Usted también puede insistir que le llame Sr., Sra., Srita. La clave de esto es que, sea cual sea la forma en que usted y el supervisor se refieren el uno al otro, debe ser igual.

2. Mientras realiza su trabajo como delegado de entrevistar a un supervisor para investigar una reclamación, usted dice que piensa que el supervisor está "tergiversando la verdad". ¿Tiene el supervisor derecho de disciplinarlo por hacer ese comentario?

No, usted tiene el derecho de cuestionar la honestidad de la gerencia cuando usted está realizando labores de la unión como delegado.

3. Mientras usted está trabajando, su supervisor le dice "muévete". En voz alta, usted responde "jódase". ¿Está protegido su comentario?

No por la regla que protege los derechos de los delegados. Usted no estaba desempeñando labores de la unión como delegado cuando esto ocurrió.

4. La gerencia anuncia que está clausurando parte de la operación. Durante el descanso, usted y unos cuantos miembros van a la oficina del gerente y le dicen que si no se espera y habla primero con la unión, puede prever demandas judiciales, prácticas laborales injustas, reclamaciones y un montón de protestas. Él dice: "Si me amenaza nuevamente, será despedido". ¿Está él en su derecho?

No, como delegado realizando labores de la unión, usted tiene el derecho de decirle a la gerencia lo que la unión podría hacer en respuesta a las acciones de la gerencia. Note que todas las cosas mencionadas son legales. Amenazar con acciones ilegales no estaría protegido y, de cualquier forma, no sería una buena idea.

5. En una reunión entre trabajadores y gerencia para dialogar sobre un asunto controversial, la plática se torna muy acalorada. La gerencia le llama a usted, el delegado, un "testarudo" irrazonable. Usted dice: "Yo personalmente le voy a romper la @#% en el estacionamiento". ¿Está este comentario entre lo que tiene derecho a decir?

No, la grosería está normalmente protegida, pero combinada con una amenaza de violencia, los comentarios son "escandalosos" e "indefendibles".

6. Un miembro que siempre anda por su lado y nunca se ha involucrado en nuestra unión recibe una suspensión de tres días por ausentismo. Usted no conoce realmente su registro de asistencia, pero tiene la impresión de que es muy malo. Él le pide a usted que presente una reclamación por la suspensión. Usted le dice: "Ah, ¿así que ahora usted necesita de la unión? Nosotros posiblemente no tengamos tiempo para ayudarlo con ésta, porque estamos ocupados con los miembros de verdad de la unión". ¿Es esto parte de sus derechos como delegado?

No, bajo el Deber de representación justa, usted debe tratar a todos los casos seria y equitativamente, sin importar quién esté involucrado. Usted debe investigar el caso antes de realizar cualquier declaración o juicios sobre la fortaleza o debilidad del caso.

7. Usted debe pedir a la gerencia ver las tarjetas de asistencia de todos los empleados del turno nocturno de un día específico de la semana pasada. La gerencia dice que son privadas y que usted no puede verlas. ¿Tiene usted derecho a ver las tarjetas de asistencia?

Muy probablemente sí. Siempre y cuando las tarjetas de asistencia sean relevantes para su tarea de investigar y manejar reclamaciones, usted debería poder verlas.

8. Los supervisores pusieron una nueva regla que todo mundo odia. Como delegado, usted comienza a recabar firmas para una petición contra la nueva regla. Usted hace esto en sus horas libres y sólo pide a los miembros que firmen en momentos en los cuales ellos tampoco están trabajando. Un supervisor lo lleva aparte y le dice: "Si yo fuera usted, no estaría alborotando por ésta, le podría costar a usted". ¿Es esto una violación a sus derechos de delegado?

Sí, aun cuando los comentarios del supervisor son poco claros, harían que delegados razonables sintieran que habían sido amenazados con algún tipo de acción adversa por realizar actividad protegida de la unión en sus horas libres.

9. Un miembro que acaba de ser despedido quiere reunirse con usted. Su carga de trabajo no es especialmente fuerte y usted le dice a su supervisor que se saldrá del área de trabajo para reunirse con un miembro para asuntos de la unión. Su supervisor dice: "Olvídelo, la compañía le paga por trabajar.

Espere hasta que salga de trabajar y entonces tenga su junta". ¿Es esto una violación a sus derechos como delegado?

Depende de lo que diga su contrato. Aunque la ley le da el derecho de representar a los miembros que han sido disciplinados, esto no le da derecho de hacerlo durante las horas de trabajo. La mayoría de los contratos, sin embargo, les dan a los delegados el derecho a manejar reclamaciones durante horas de trabajo, sujeto a restricciones razonables.

UNION POWER = ACTIVE MEMBERS

Total Time—2.5 hours

Learning Goals

- Understand how and why people become active in our union.
- Discuss the importance of signing up and welcoming new members.
- Consider what's useful to learn about our co-workers and how to track the information.
- Learn the elements of an effective one-on-one conversation.
- Practice sharing our own stories and talking with co-workers.

Sections—Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. How and Why People Become Active—15 minutes
- III. Signing Up New Members—5 minutes
- IV. Welcoming New Employees—15 minutes
- V. Learning About Our Co-Workers—15 minutes
- Break—15 minutes
- VI. Charting and Mapping Our Worksites—15 minutes
- VII. Sharing Our Story—30 minutes
- VIII. Conversations with Co-Workers—30 minutes
- IX. Wrap-Up—5 minutes

Materials Needed

Flip Chart, Markers, Tape
Copies of the Steward Handbook

Handouts/Worksheets

Talking with Members Handout
Box Room Handout
Map Your Workplace Handout
One-to-One Conversations Handout
Sharing Your Story Worksheet
Member Profiles (4) Worksheet

I. Goals for the Training—5 mins



Post and review the goals for the training:

- Understand how and why people become active in our union.
- Discuss the importance of signing up and welcoming new members.
- Consider what's useful to learn about our co-workers and how to track the information.
- Learn the elements of an effective one-on-one conversation.
- Practice sharing our own stories and talking with co-workers.

II. How and Why People Become Active—15 mins



Observe that identifying and recruiting others to become more active in our union is one of the most important contributions a steward can make.

Ask how and why the participants became involved in our union. Ask a few people to share their stories, including as many specifics as possible (Why were you interested in and willing to be involved? Did someone recruit you?, Why did they recruit you?, Were you asked to participate in an action or event? What was that like?)



Reflecting on these stories and their own experience, ask the group how and why they think people become involved in our union. Chart the responses.

Add the following if not mentioned:

- People often become involved when there's something that affects them personally.
- It's easier for people to become active if there are concrete actions—i.e. asking someone to sign a petition or to help distribute a survey.
- It's important to have a series of steps as part of these actions— so that their involvement can build.
- People have different interests and skills. Someone who won't attend a meeting might be interested in participating in a rally.

Module Icon Key



Flip Chart



Ideas



In Handbook



Worksheet/
Handout

- Sometimes people need assistance with childcare or rides—helping to alleviate the barriers to their involvement can make a real difference.

III. Signing Up New Members—5 mins

Note: You can skip this section if the participants do not work in a so-called “right to work” state.

Explain that in a number of states, UFCW local unions operate under so-called “right-to-work” laws. These laws are designed to weaken our ability to represent workers effectively by limiting how we’re able to collect union dues (in states that do not have “right-to-work” legislation, once workers come together to form a union, they all pay dues—and don’t have to sign up individually).

So-called “right-to-work” laws are really the opposite, bringing down wages and benefits and hurting our right to represent our co-workers.



If you live in a so-called “right-to-work” state, one of your primary jobs as a steward is to know who belongs to our union at your worksite, and to sign up everyone else.

IV. Welcoming New Employees—15 mins



One of the most critical roles of union stewards is welcoming new employees into our union.

Explain that it’s critical for new members to learn about our union from other union members (versus from management). By talking with new employees about what union membership means, stewards can also find out what people care about and how they might want to participate.

Ask if anyone has had conversations with new employees or participated in a new member union orientation. If so, ask people to describe their experience.



Ask for tips on how to approach new employees, and what to include during these conversations. Chart the responses.

If not included, mention:

- Try to avoid lecturing people; ask questions that draw out their experiences and ideas
- Share why you became involved and why you’re a steward; what being a part of our union means to you
- Explain what a union is (building off of their knowledge)
- Introduce the contract/ review highlights of important language
- Let them know how to reach you in the future

- Invite them to meetings, actions and events
- Ask how they'd like to be involved (offer options, so that attending a meeting isn't the only way to show an interest or become involved)
- Check back with them

IV. Learning About Our Co-Workers—15 mins

Explain that whether you're having a conversation with a new employee or someone who's been at your worksite for many years, it's important to learn more about who they are and what they care about. Ask what kinds of things we might want to learn about our co-workers. Chart the responses.

If not included, mention:

- Name and contact information
- Where they work (department/area)
- When they work (shift/ schedule)
- What they do (job titles/ classifications)
- Their familiarity with unions
- How long they've worked at this job (seniority)
- Their first language and other languages they speak
- The problems they'd like to see addressed at work
- Questions and thoughts they have about our union
- Their social connections at work (who they take breaks, eat, carpool with, etc.)
- Community organizations or places of worship they are involved with (this may be useful if/when our union needs support around bargaining or organizing campaigns)

Explain that it's also important to understand the ways that people's ability, age, ethnicity, gender, language, race, religion and sexual orientation impact their work and life experiences. As stewards, we may notice if workers from different groups are not participating in our union (and then try to include them).



Stewards are uniquely able to serve as a bridge between people, protect against any employer divide-and-conquer tactics, and help to build solidarity.



Point out that a list of things we'd like to learn about our co-workers is in the Steward Handbook.

V. Charting and Mapping Our Worksites—20 mins

Explain that it would be impossible for any of us to remember all of the information we learn about our co-workers. For this reason, we need to record and track as much of it as we can.



Distribute and review the Talking with Members Handout. Explain that this is a basic chart that can be used to track what we've learned from conversations with our co-workers.

Ask what's missing from this chart (friendship networks, seniority, etc). Explain that sometimes we might need to use a few different charts or lists. In some cases, we may be able to contribute important information (like keeping members' contact information up-to-date) to our local union, so that it can be centrally organized and tracked.



Distribute and review the Box Room Handout. Explain that it is an example of a chart used in a so-called "right to work" state, where everyone is not a union member.

Observe that the names between the dashed lines are friends. The stars indicate the people who are union activists and the 1s, 2s and 3s reveal whether they are union members, undecided about joining our union or are anti-union.

Explain that the same type of chart could be used in a worksite where everyone is a union member, but where we want to track member's feelings about a political or worksite issue (similarly using 1s, 2s and 3s).

Ask what's missing from this chart (contact information, languages spoken, etc).



Charting our worksites is particularly useful for revealing where our union is strong and where it's weak—in terms of shifts, job classifications and among different groups of members. By identifying these weaknesses (for example, if we realize that there are no union activists on the second shift), we learn who we need to talk with and recruit.

Note that it's important to keep some information, such as numerical ratings of members, on charts in private files.

If there is a chart or form that the local union uses for tracking information about members, share this with the participants.

If you have extra time, distribute the Mapping Your Worksite handout and break the participants into small groups, with flip chart paper and markers (you can also provide different colored sticky-dots, for participants to use with their maps), asking them to begin the process of mapping their work areas according to the directions on the handout. This process will

take approximately 45 minutes, 25 minutes for the map making and 20 for report-backs.

VI. Moving Our Co-Workers to Take Action—10 mins

Explain that once we know who we want to approach, and what we want to recruit them to do, we need to initiate one-to-one conversations with our co-workers.



Distribute and review the One-to-One Conversations handout.

Ask for people's reactions to the handout and what they might add or change. Explain that the full outline might happen over the course of one or more conversations, but that it's important—since our goal is to grow our union's power—to never leave a conversation without asking people to take action.

VII. Sharing Our Story—30 mins

Explain that we're now going to focus on #3 from the outline: "sharing your story." Observe that many stewards find this part of a conversation challenging.

While we always want to listen more than we talk, it's important that when we are talking that we're not lecturing people.

By sharing our own short (2-3 minutes) stories, we invite others to do the same and inspire them to take action.



Distribute the Sharing Your Story Worksheet and ask for volunteers to read the three different story-starters.

Explain that they'll have ten minutes to work on their own, thinking about which story they want to share, making notes and preparing to share this story with another participant.

After ten minutes, ask people to pair up with someone they don't know well and to practice sharing their stories. Explain that you'll let them know when to begin and when to stop.

Once everyone's seated with their partners, announce when they should start, and, after three minutes, to stop.

Repeat this process, asking the pairs to switch.

After both people have shared their stories, ask them to discuss, for five minutes, how they think it went.

While constructive feedback about how the stories were told is welcome, ask the participants not to critique or question the content of each other's stories.

Bring everyone back together and ask what people's experience was like with this exercise. What was easy? What was difficult? How did it feel to share your story? How did it feel to hear someone else's story? What did you learn? Will you share your story with your co-workers?

VIII. Conversations with Co-Workers—30 mins



Divide the participants into small groups and give each group one of the four Member Profile handouts.

Ask the groups to read and discuss the handout together, and for one person in the group to take notes for the report-back. Explain that they have ten minutes for this section of the exercise.

After ten minutes, ask the groups to role-play a conversation with the person profiled on their handout (each group will need two volunteers; one to play themselves, a steward, and the other to play the worker they've just been discussing). Remind everyone about the outline on the One-to-One Conversations handout.

Give the groups a few minutes to decide who will volunteer and inform them that they'll have five minutes for the role-play. Let them know when to begin, and, after five minutes, when to end the conversation.

Bring the groups back together to de-brief. Ask each group to a) introduce the worker on their handout and to share highlights from their initial conversation about the questions on the sheet and b) to reflect on the role-play.

Ask if people had specific ideas for what they could ask the workers to do. Chart the responses.

If asking people to come to meetings is the primary action step mentioned, challenge the participants to brainstorm other possibilities (not because attending meetings isn't important, but because recruiting people is most effective when there are a variety of options). If this is difficult, encourage them to work with their union representatives to come up with other options (updating the union bulletin board, writing an article for the union newsletter, posting photos to the union's facebook page, organizing the kid's activities at the union's picnic, attending a public-hearing on an issue that affects working people, investigating a workplace issue that many people seem upset about, joining the labor-management safety committee, etc.)

Observe that the One-to-One Communications handout mentions "agitating" around a specific issue and asking people to take specific actions related to this issue.



Often, the best way to involve our co-workers, is to organize a worksite-related campaign, with concrete roles for members.

Note that for a co-worker like Juan, who many people look up to and who's "always on-board," his action step might be to become a steward/other type of leader within the union.

Identifying and recruiting other leaders is a key role for union stewards.

NOTES



Wrap-Up—5 mins

Refer back to the beginning of the workshop and the participants' stories of how they became involved in our union. Observe that it's now our job to recruit and encourage others. Through one-to-one conversations where we share our own stories and learn more about our co-workers, we can involve more members and build real worksite power.

HANDOUT: TALKING WITH MEMBERS

Talking with Members		Steward:
		Job/Shift:
Name	Contact	Comments / Questions / Concerns
A. Sue Groff	555-221-1111 (cell)	She's bilingual (Spanish & English). Loved the Tuesday actions. Interested in helping with organizing campaigns. Said she'd come to the June meeting.
B. Ernesto Sánchez	555-331-1313 (cell)	Had a bad experience with a union at a previous job. Upset that safety problems don't get fixed. He may come with Bob to June meeting.

BOX ROOM

Shift, Rating, Friendship Networks*

1=Union Member 2=Undecided 3=Anti-Union
 ★=Union Activist COUNT: 21 Members/48 Total

1st SHIFT	2nd SHIFT	3rd SHIFT
1 Sara Hayes ★	2 Thai Nguyễn	3 Carlos Zacapa
1 Hao Phan	2 Jeff Lee	3 Shawn Lee
1 Christy Brown	1 Rosa Miller	1 K.C. Hoag ★
1 Ana Ortiz ★	2 Vicky London	2 Louann Day
1 Joe Johnson	3 Juan Carrilo	1 Scott Frotman ★
1 Jason Parks ★	2 LaTonya Lewis	3 Chris Olson
1 José Sanchez ★	2 Shirley Eaton	2 Jody Fisher
2 Kwasi Saro-Wiwa	2 Donald Jones	1 Wayne Anthony
1 Karen Brand	1 Paula Harris ★	1 Aung San
2 Claudia Luna	2 D'Shauna Jones	3 Don Craig
2 Bob Bett	1 Rhonda Smith	2 Sharonda Wells
1 Maria Rios	2 Faizah Olanrewaju	2 Brian Atkins
1 Lien Lê	2 Joseph Oppong	1 Abdulah Sidran ★
3 John Scott	1 Maria Vera	3 Michael Duke
2 Bill Meyer	2 Nick Murphy	2 Anna Cortes
2 Iman Azikiwe	1 Jean Gombri ★	1 Kim Jung

**This chart reflects a worksite in a so-called "right-to-work" state where some workers are union members and some aren't. A similar chart could be used in a non-right to work state, to track how interested members are in becoming more involved, their feelings about political issues, etc.*

HANDOUT: MAP YOUR WORKPLACE

Mapping your workplace will give you a picture of where the union is strong and where it's not. You can then build on those strengths to develop more power. Mapping your workplace—and keeping it updated—is an ongoing process.

WHAT CAN A WORKPLACE MAP TELL YOU?

- How people are already organized, both formally and informally.
- How communication happens—and how worksite leaders can tap into this.
- How to identify leaders.
- Who gets to walk around and interact with most of the employees.
- How management is organized.

HOW TO MAP YOUR WORKPLACE

Begin with a large (flip chart size) piece of paper and different colored markers. If the workplace is a large facility, you may want to begin by mapping your department or shift and to then work with other worksite leaders to piece together a map of the entire workplace.

- Begin by drawing an outline of your department. Imagine that you are a fly on the ceiling, looking down. Note workstations, desks, machines, etc.—a floor plan.
- Place a circle where every worker is usually stationed and write in their names. Identify people who are active with our union, on the fence/unknown, and those who are anti-union. You may want to use different symbols or colors for each of these categories.
- Identify workers who can move around, if this matters.
- Indicate new hires.
- Identify and circle informal work groups. Informal work groups are workers who frequently interact with each other. They may spend time together on breaks.
- Mark the influential people or informal leaders. Sometimes these will be stewards, sometimes not.
- Indicate on your map where members of management are usually stationed.
- Mark where workers tend to gather (break areas, lunchrooms, bathrooms, water fountains). Identify who gathers with whom in these places. Identify who the leaders are in those groups.
- You may want to keep notes on each worker such as: date of hire, whether they have been active with our union, conversations you've had with them (their concerns and interests). These notes should be kept separately.

Your diagram may show that the workplace keeps some people divided; a good reason for map-making.

HANDOUT: ONE-TO-ONE CONVERSATIONS

The following is a guide for one-to-one conversations when the goal is moving workers to take action.

1. Introduce yourself and explain why you are talking with workers.

- If you don't know the person: "Hello, I'm Sylvia, I'm a steward with Local x."
- "We've been talking with workers about (whatever the identified problem is)."

2. Listen to the worker's concerns, and agitate around the issue.

- Ask basic questions like: "How long have you worked here?" "What shift do you work on?" "What kind of work do you do?"
- Get specific: "Has (the identified problem) affected you?" "How?"
- Agitate around the issue: "Do you think this is fair?" "Don't you think we should do something about this?"
- Don't interrupt or jump to conclusions. Keep asking questions.
- Ask what other concerns the worker has.

3. Share your own story.

- You became involved in our union for a reason and it's important to share why.
- By sharing your own story, you build trust and help others to see what you have in common.
- Your story can inspire others to take action; if you can do this, so can they.

4. Educate about our union and what we can do to build power.

- "If we act as a group, management will be more likely to listen."
- "We're reaching out to as many people as we can so that we can have a greater say in what goes on and make some real changes."
- "By sticking together, we can take an active role in improving our jobs."

5. Ask the worker to participate.

- "Will you wear a button, sign a petition, come to a meeting," etc. "Will you take part in whatever the action is?"
- "Can I keep in touch with you?"
- "Who else is affected by this problem? Will you introduce me to them?"

6. Get a specific commitment.

- Remind people: "Remember to wear your button, come to the meeting at 5:00 p.m. tomorrow," etc. (whatever the action is)
- "Thank you for being a part of this. I'm really glad you're on board."

WORKSHEET: SHARING YOUR STORY

Choose one of these and write some notes (you can use the back of the page as well) for yourself. Keep these notes in mind when you practice sharing your story. Remember, you will only have 2-3 minutes to share your story.

- 1. Why do you care about building the union power? What does being a union member mean to you? How does this relate to your decision to be a steward?**
- 2. What is a challenge you've had to face in your life and how did you overcome this? How does this story relate to your decision to be a steward?**
- 3. Is there a time when you stood up for something you believed in? What gave you the strength/ determination to do this? Did others join with you? How does this story relate to your decision to be a steward?**

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

WORKSHEET: MEMBER PROFILE #1

MEMBER PROFILE #1: *Gloria: New Member*

Gloria is a new employee and you're not sure what she knows or thinks about her new job and/or about our union.

How will you build a relationship with Gloria?

How will you incorporate parts of your own story into the conversation?

How will you learn about her skills and interests?

What, specifically, can you ask her to do?

MEMBER PROFILE #2: *Tony: Active in the Past*

You've heard that Tony was active in our union in the past, but he hasn't come to any events or meetings this year. You're not sure why.

How will you build a relationship with Tony?

How will you incorporate parts of your own story into the conversation?

How will you learn about his skills and interests?

What, specifically, can you ask him to do?

MEMBER PROFILE #3: *Juan: Always On-Board*

Juan is always at union meetings and events. He seems to have good ideas and many people look up to him.

How will you build a relationship with Juan?

How will you incorporate parts of your own story into the conversation?

How will you learn about his skills and interests?

What, specifically, can you ask him to do?

MEMBER PROFILE #4: *Connie: Never Interested*

Connie's a long-time employee where you work and, as far as you know, she's never been interested in anything related to our union.

How will you build a relationship with Connie?

How will you incorporate parts of your own story into the conversation?

How will you learn about her skills and interests?

What, specifically, can you ask her to do?

Hablar con miembros		Delegado:
		Puesto/Turno:
Nombre	Contacto	Comentario / Preguntas / Inquietudes
A. Sue Groff	555-221-1111 (celular)	Ella es bilingüe (español e inglés). Le encantaron las actividades de los martes. Está interesada en ayudar a organizar campañas. Dijo que ella vendría a la reunión de junio.
B. Ernesto Sánchez	555-331-1313 (celular)	Tuvo una mala experiencia con una unión en un trabajo anterior. Molesto porque los problemas de seguridad no se arreglan. Posiblemente venga con Bob a la reunión de junio.

CUARTO DE CAJAS

Turnos, calificaciones, redes de amistades*

1=Afiliado 2=Indeciso 3=Anti Unión

★=Activista de la Unión

CONTEO: 21 miembros de 48 en total

1st SHIFT	2nd SHIFT	3rd SHIFT
1 Sara Hayes ★	2 Thai Nguyễn	3 Carlos Zacapa
1 Hao Phan	2 Jeff Lee	3 Shawn Lee
1 Christy Brown	1 Rosa Miller	1 K.C. Hoag ★
1 Ana Ortiz ★	2 Vicky London	2 Louann Day
1 Joe Johnson	3 Juan Carrilo	1 Scott Frotman ★
1 Jason Parks ★	2 LaTonya Lewis	3 Chris Olson
1 José Sanchez ★	2 Shirley Eaton	2 Jody Fisher
2 Kwasi Saro-Wiwa	2 Donald Jones	1 Wayne Anthony
1 Karen Brand	1 Paula Harris ★	1 Aung San
2 Claudia Luna	2 D'Shauna Jones	3 Don Craig
2 Bob Bett	1 Rhonda Smith	2 Sharonda Wells
1 Maria Rios	2 Faizah Olanrewaju	2 Brian Atkins
1 Lien Lê	2 Joseph Oppong	1 Abdulah Sidran ★
3 John Scott	1 Maria Vera	3 Michael Duke
2 Bill Meyer	2 Nick Murphy	2 Anna Cortes
2 Iman Azikiwe	1 Jean Goumbri ★	1 Kim Jung

*Este diagrama refleja lo que es un lugar de trabajo en un estado bajo la llamada "ley del derecho a trabajar" en la que unos trabajadores están afiliados a la unión y otros no. Se puede utilizar un diagrama parecido en un estado que no tiene ley del derecho a trabajar, y con él se registra qué tan interesados están los afiliados en participar más, cuáles son sus sentimientos sobre los asuntos políticos, etc.

Mapear su lugar de trabajo le dará a usted una idea de dónde es fuerte la unión y dónde no. Usted puede entonces basarse en esas fortalezas para desarrollar más poder. Mapear su lugar de trabajo, y mantenerlo actualizado, es un proceso continuo.

¿QUÉ PUEDE DECIRLE UN MAPA DE SU LUGAR DE TRABAJO?

- Cómo está organizada la gente actualmente, tanto formal como informalmente.
- Cómo se realiza la comunicación, y cómo pueden ganar acceso a ella los líderes del lugar de trabajo.
- Cómo identificar líderes.
- Quién es el que anda caminando e interactuando con la mayoría de los empleados.
- Cómo está organizada la gerencia.

CÓMO MAPEAR SU LUGAR DE TRABAJO

Comience con una pieza de papel grande (tamaño para rotafolio) y marcadores de diferentes colores. Si el lugar de trabajo es una instalación grande, usted podría comenzar mapeando su departamento o turno y luego trabajar con otros líderes del lugar de trabajo para armar un mapa del lugar de trabajo entero.

- Comience dibujando un bosquejo de su departamento. Imagine que es una mosca en el techo, mirando hacia abajo. Apunte las estaciones de trabajo, escritorios, máquinas, etc.: un plano de piso.
- Coloque un círculo en donde normalmente está colocado cada trabajador y escriba sus nombres. Identifique a la gente que está participando en nuestra unión, indecisos/desconocidos, y aquéllos que están en contra de las uniones. Usted podría usar símbolos o colores diferentes para cada una de esas categorías.
- Identifique a trabajadores que se pueden cambiar de un lado a otro, si esto es importante.
- Señale a los empleados nuevos.
- Identifique y ponga un círculo alrededor de grupos informales de trabajo. Los grupos informales de trabajo son trabajadores que interactúan entre sí frecuentemente. Ellos posiblemente se juntan durante los descansos.
- Marque a las personas influyentes o líderes informales. Algunas veces éstos serán delegados, otras veces no.
- Indique en su mapa dónde se encuentran normalmente los miembros de la gerencia.
- Marque dónde tienden a reunirse los trabajadores (áreas de descanso, comedores, baños, bebederos). Identifique quién se reúne con quién en esos lugares. Identifique quiénes son los líderes en esos grupos.
- Usted podría tomar apuntes sobre cada trabajador, tales como: fecha de contratación, si han participado en nuestra unión, conversaciones que usted ha tenido con ellos (sus preocupaciones e intereses). Estos apuntes deben guardarse por separado.

Su diagrama podría mostrar que el lugar de trabajo mantiene a alguna gente separada; una buena razón para hacer mapas.

A continuación se encuentra una guía para conversaciones a solas cuando la meta es estimular a los trabajadores para que actúen.

1. Preséntese y explique por qué está hablando con los trabajadores.

- Si no conoce a la persona: "Hola, soy Sylvia, soy una delegada con la Local x".
- "Hemos estado hablando con los trabajadores sobre (cualquier problema que se haya identificado)".

2. Escuche las preocupaciones del trabajador y entusiásmelo tomando como base ese asunto.

- Haga preguntas básicas como: "¿Hace cuánto que trabaja aquí?" "¿En qué turno trabaja?" "¿Qué tipo de trabajo hace?"
- Sea específico: "¿Lo ha afectado (el problema identificado)?" "¿Cómo?"
- Entusiásmelo tomando como base ese asunto: "¿Usted piensa que esto es justo?" "¿No cree que debemos hacer algo acerca de esto?"
- No interrumpa o saque conclusiones de antemano. Siga haciendo preguntas.
- Pregunte al trabajador qué otras preocupaciones tiene.

3. Comparte su propia historia.

- Usted se involucró con nuestra unión por una razón y es importante compartir ese por qué.
- Al compartir su historia, usted crea confianza y ayuda a otros a ver qué tienen en común con usted.
- Su historia puede inspirar a otros a actuar; si usted puede hacerlo, también ellos pueden hacerlo.

4. Enséñeles sobre nuestra unión y qué podemos hacer para adquirir poder.

- "Si actuamos como grupo, es más posible que la gerencia escuche".
- "Estamos comunicándonos con toda la gente que podemos, para que podamos tener mayor influencia en lo que sucede y realizar cambios verdaderos".
- "Al mantenernos unidos, podemos desempeñar un papel activo para mejorar nuestros trabajos".

5. Pida al trabajador que participe.

- "¿Usaría usted un broche, firmaría una petición, vendría a una reunión?", etc. "¿Participaría en la actividad que sea?"
- "¿Me puedo mantener en contacto con usted?"
- "¿A quién más le afecta este problema?" "¿Me los presentaría?"

6. Obtenga un compromiso específico.

- Recuérdele a la gente: "Acuérdese de usar su broche, venir a la reunión a las 5 pm mañana", etc. (cualquiera que sea la actividad)
- "Gracias por participar. Estoy muy contento de que esté con nosotros".

Elija uno de éstos y escriba algunas notas para sí mismo (usted puede usar también la parte de atrás de la hoja). Mantenga estos apuntes en mente cuando usted practique cómo compartir su historia. Recuerde, usted sólo tendrá 2-3 minutos para compartir su historia.

1. ¿Por qué le interesa fortalecer a la unión? ¿Qué es lo que significa para usted ser miembro de la unión? ¿Cómo se relaciona esto a su decisión de ser delegado?
2. ¿Cuál es un reto que usted ha tenido que enfrentar en su vida y cómo lo superó? ¿Cómo se relaciona esta historia a su decisión de ser delegado?
3. ¿Hubo algún momento en que usted defendió algo en lo que creía? ¿Qué le dio la fortaleza/ determinación de hacerlo? ¿Se unieron otros con usted? ¿Cómo se relaciona esta historia a su decisión de ser delegado?

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

PERFIL DE MIEMBRO #1: Gloria: Miembro nuevo

Gloria es una nueva empleada y usted no está seguro de lo que ella sabe o piensa sobre su nuevo trabajo y/o sobre nuestra unión.

¿Cómo establecerá una relación con Gloria?

¿Cómo incorporará partes de su propia historia en la conversación?

¿Cómo averiguará sobre sus habilidades e intereses?

Específicamente, ¿qué le pedirá que haga?

PERFIL DE MIEMBRO #2: Tony: Participaba en el pasado

Usted ha oído que Tony antes participaba en nuestra unión, pero no ha venido a ningún evento o reuniones este año. Usted no está seguro del por qué.

¿Cómo establecerá una relación con Tony?

¿Cómo incorporará partes de su propia historia en la conversación?

¿Cómo averiguará sobre sus habilidades e intereses?

Específicamente, ¿qué le pedirá que haga?

PERFIL DE MIEMBRO #3: *Juan: Siempre participa*

Juan siempre está en las reuniones y eventos de la unión. Siempre parece que él tiene buenas ideas y mucha gente le admira.

¿Cómo establecerá una relación con Juan?

¿Cómo incorporará partes de su propia historia en la conversación?

¿Cómo averiguará sobre sus habilidades e intereses?

Específicamente, ¿qué le pedirá que haga?

PERFIL DE MIEMBRO #4: *Connie: Nunca se ha interesado*

Connie es una empleada de muchos años donde usted trabaja y, por lo que usted sabe, ella nunca ha estado interesada en nada que tenga que ver con nuestra unión.

¿Cómo establecerá una relación con Connie?

¿Cómo incorporará partes de su propia historia en la conversación?

¿Cómo averiguará sobre sus habilidades e intereses?

Específicamente, ¿qué le pedirá que haga?

ORGANIZE

Total Time—3 hours

Learning Goals

- Discuss why it's effective when members tell their story to non-members and why members should be involved in helping to organize workers.
- Examine how to overcome workers' fears of joining together.
- Practice initiating first contact during an organizing campaign and moving through a conversation with workers.
- View examples of creative ways members have engaged in actions to support organizing campaigns.

Sections—Time

- I. Welcome, Review Goals of the Training—5 minutes
- II. Being Part of Our Union—10 minutes
- III. Why Organize and Why You—30 minutes
- IV. Overcoming Challenges in Organizing: Facing Fear—30 minutes
- V. First Conversations with Non-Union Workers—30 minutes
- VI. Home Calls—30 minutes
- VII. Home Call Role Play—30 minutes
- VIII. Wrap-Up—15 minutes

Materials Needed

Flip Chart, Markers, Tape

Copies of the Steward Handbook

Internet Connection, Laptop, Projector, Speakers and Screen/Blank Wall

Handouts/Worksheets

Talking Union with Non-Union Workers

A Complete House Visit

Preparing for the Workshop

The facilitation team for this training should include experienced organizers.

The training includes multiple internet videos. A solid internet connection is recommended.

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I. Goals for the Training—5 mins

- Discuss why it's effective when members tell their story to non-members and why members should be involved in helping to organize workers.



- Examine how to overcome workers' fears of joining together.
- Practice initiating first contact during an organizing campaign and moving through a conversation with workers.
- View examples of creative ways members have engaged in actions to support organizing campaigns.

II. Being a Part of Our Union—10 mins

Ask what the participants value about being a part of our union (chart responses and post, for reference later).

III. Why Organize and Why You?—30 mins

Ask: Why do organizing campaigns to bring more workers into our union matter to us? Chart responses.

If participants don't mention these points, explain that:

- Our own self-interest. For all of the reasons we mentioned that being a part of the union matters, we want to insure that we grow to be even more powerful. Bringing new workers into our union can improve our ability to make change at our own workplaces and to negotiate and enforce strong contracts. This, in turn, positively impacts our families and communities and leads to broader social and economic justice.
- Our organizing campaigns are part of a bigger plan to grow the union density (how many people belong to unions) in our industries. This helps to win new protections and to keep the gains we've already achieved, including our benefits, job security, fair treatment, working conditions and wages.

Show the video "This is Why We Fight" <http://www.youtube.com/watch?v=8TKVsZ4iYaE>. Discuss the video as a large group, reinforcing why new organizing matters to build our power.

Module Icon Key

Flip Chart



Ideas



In Handbook

Worksheet/
Handout

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Ask: How can you connect with people who may not have previous experience with a union (or are unfamiliar with unions in the U.S.)? Could sharing your own story be effective? Chart responses.



If participants don't mention these points, explain that:

- “Showing” (with specific examples) versus just “telling” them that workers are the union/ have power
- Sharing your own experience-no one can tell a story like someone who's lived it. A grocery worker telling her story to another grocery worker is more impactful than someone who's never done this work (and exercised rights under the contract). Your voice is powerful!

Explain that there are two short videos that members created as part of their contract campaigns to share why being a part of a union is important. The first is “One union/One Voice” and the other is “Retail Workers Speak Out!”

Ask the participants to listen closely for the message that the workers convey.

Show the videos: <http://www.youtube.com/watch?feature=endscreen&v=shKuFW8vvJI&NR=1>

<http://www.youtube.com/watch?feature=endscreen&v=EGMDPgB6HtY&NR=1>

IV. Overcoming Challenges in Organizing: Facing Fear— 30 mins



Ask: What are some challenges you foresee when trying to talk to non-union workers about organizing? Why aren't more people in unions? Chart responses.



If participants don't mention these points, explain that:

- Fear is a challenge that all workers have to overcome to be successful in organizing a union.

This includes:

- Fear of the unknown (a worker may have never been part of a union and only heard what their bosses say about organized labor)
- Fear of losing their job and what this would mean for them and their families
- Fear through intimidation- after being disrespected and pushed down for so long, it may be difficult to see that there's another possibility (standing together and organizing).

Ask: How can we help people to overcome their fear? What would you do to move non-union workers past their fears so that they can organize together? Chart responses.

Referring to the participants' responses, highlight comments related to anger or hope. If no one identifies anger or hope, explain that:

- When dealing with a strong emotion like fear, we need another emotion just as strong (or stronger) to overcome it. Two powerful emotions, similar to fear, are anger and hope.
- We can use hope and anger to move people to act (not just react) in place of fear. The idea that with unity there is hope can be very powerful. This not only applies to strength in numbers, but also the hope that change is possible.

Refer back to the charted responses about why belonging to our union is valuable and identify hopeful responses (I like having a contract that provides greater benefits for me and my family) or angry responses (I hate the way management treats us and we get to fight back with our union).

Explain that in order to figure out what a person might feel hopeful or angry about, we need to know what they care about. In union organizing, we sometimes call this “finding the issues.” In order to learn about workers' issues, we need to talk with them. One-to-one communication is key.



Ask: Where do you think we can have these conversations?

If participants don't mention these points, explain that:

- Talking with workers in their homes is usually the safest space. If not their homes, another location where we and the worker(s) can talk and listen freely to one another.

Reinforce that one-to-one communication is critical and is the most important role for members during organizing campaigns. By sharing our own stories, we can make the idea of a union real for other workers.

V. First Conversations with Non-union Workers—30 mins

Explain that our first contact with workers is usually quick. Most often it's at a worksite or in a parking area near a worksite. Our goal is to engage the workers enough in this brief exchange to get their contact information and some sense of their key concerns or issues. This will help to lay the ground-work for later conversations.

We often call our organizing conversations (whether quick or more detailed), our “rap.” The “rap” is an outline for the conversation that can help us stay focused and be most effective as organizers.



Distribute and review the Steps in Talking Union with Non-union Workers handout.

Example Role Play

Ask for a volunteer to come up to the front of the room, to play a worker being approached by a union organizer. As the facilitator, you will play the organizer. Explain that this is an example of what the “rap” might look like.

This is a sample script for the role play. It is provided here as a guide; make it your own:

Hi my name is... And I'm a member of the UFCW union from (such and such). Some of your Fresh and Easy co-workers contacted us about... So what's it like working here? Is there one thing that you think would make this an even better place to work? Oh, that makes sense. I can see how that would improve your job. We've been able to make some changes like that with our union at ... and this has helped me/ my family because... Does this sound like something you might be interested in learning more about? Great. I have a lot more to tell you. Can I get your contact info-so we can talk when you're not working?

Role Play in Pairs

Break the participants into pairs. Explain that everyone will have a chance to play a) an organizer and b) a worker being approached. Ask everyone to practice taking turns having an initial contact conversation. Explain that this is their warm-up for the next exercise and should take 10 minutes (5 minutes for each conversation).

Parking Lot Role Play

Once everyone has practiced in pairs, divide the participants into two groups. Explain that one group will play workers who've just gotten off of work and are walking in the parking lot and that the other group will play organizers approaching them. Explain that who they approach will be random, just as it would be in an actual parking lot. Encourage them not to think too much about who they approach.

Remind everyone that the first goal is to approach workers and have an initial conversation. The second goal is to leave with some contact information (name, address, phone number). Explain that they'll have 5 minutes total for the one conversation.

Debrief

Bring everyone back together and ask how they felt about the parking lot role play. Were they able to achieve both goals? What was easy about the exercise? What was challenging? What ideas/tips do they have?

VI. Home Calls (or other extended in-person conversations)—30 mins

Explain that although workers may initially have some questions and/ or concerns about why we've appeared at their door, we'll be able to get past these by having genuine conversations. For the most part, people feel more comfortable talking about their jobs away from their worksite and when they're in their own space.



Distribute and review the handout, A Complete House Visit. Ask what questions the group has about the handout.

Explain that once a worker has let us into their home, we need to start a conversation.



Ask: What do you think are some good first questions? Chart responses.

If participants don't include these questions, mention:



- How long have you worked there?
- If you could change one thing at work what would it be?
- Have things gotten better or worse- if so, how? (for long-time employees)
- Are things better or worse than you expected? (for newer employees)

Explain that, in addition to asking these questions, there are some communication tips that can help our home calls go well.



Pre-Chart the words in bold and review the list with the group:

- **Listen.** Try to listen more than you talk
- **Go deeper, not wider.** If the worker tells you that their employer has a bad temper, don't change the subject to talk about health insurance.
- **Follow a question with a question.** Use follow up as a tool to encourage the worker to share more, and ask questions that make sense.
- **Ask open ended questions.** You can't have a real conversation with a worker if you set things up for them to only respond with a yes or no.
- **You're not taking a poll.** If it starts to feel this way, you may be talking too much
- **If you don't know... ask!** We're organizers, not their co-workers. Don't act like you're an expert and remember that people usually like to explain more about their own experience.

VII. Home Call Role Play—30 mins

Explain that we're now going to practice home calling workers.

There are two facilitation options:

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- If there are enough experienced organizers/facilitators who can help with this section, break everyone into small groups, with each of the experienced organizers playing the workers being home called (as well as leading the group/ keeping the exercise on track).
- If there are only one or two experienced organizers/facilitators, keep everyone together, with the experienced organizer(s) playing the workers and leading the group.

How to lead the role play: Whether in a small or large group, ask the participants to pair up and assign each pair one section of a home call visit—i.e. “getting in the door” “learning about the worker’s issues,” “educating about our union,” “agitation” and so on. The facilitator should play the same worker throughout.

Facilitators may choose to stop after each section of the home call visit to de-brief what worked well and what could have been improved, or to wait to de-brief at the end. Either way, there will be short pauses as the pairs switch out throughout the conversation.

As preparation for the role-play, explain that during the course of conversations with workers, we’re likely to encounter people who have many questions—some that may seem tough to answer.

Remind everyone that we don’t need to know everything; but that we should be honest and provide accurate information—and that it’s always okay to say that you don’t know something, but will try to get an answer (and then follow-up).

Encourage the participants to use their knowledge of their union contract and overall experience as a member and steward in our union to help when answering tough questions.



Explain that it’s also helpful, when faced with tough questions, to think in terms of “AAR”. Pre-chart the words in bold and review the list with the group:

- **Affirm.** Agree that their concern is valid- you may not understand why this is a concern for them but it’s important to affirm/ respect that, for them, this is real.
- **Answer.** Explain how organizing together (and getting a union contract) can help with such concerns. This is where your knowledge as a union steward/protector of worker’s rights can be very powerful
- **Redirect.** Refer back to their issues and challenge them to organize with others to make changes. Like we discussed earlier, when we’re dealing with a strong emotion like fear, we need to draw out emotions just as

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strong to combat it. Remind the worker why organizing makes sense based on what they told you their issues were. Inspire enough anger and/or hope to move past their tough questions/reservations

If time permits, ask the participants to practice “AAR” with common tough questions that they may encounter on the campaign (either ask the group to generate a list of such questions, or provide a list of the most common).

Experienced organizers should play the workers with the tough questions, either in the full group, or in break-outs.

VIII. Wrap Up—15 mins

Remind everyone that as stewards and member activists, they are a critical part of our organizing efforts. Thank everyone for participating in the training and explain that before we leave, we’re going to watch two videos that highlight members’ contributions during organizing campaigns:

http://www.youtube.com/watch?v=uYA3xC_jx2I (UFCW and OUR Walmart members)

<http://www.youtube.com/watch?v=SiNJVHQxNvE> (UFCW Local 21 members with Santa)

If time permits, you can also share:

<http://www.youtube.com/watch?v=02zjE-aQ-3w> (Lancaster, CA Walmart action)

<http://www.youtube.com/watch?feature=endscreen&v=EnuUN2WxhWk&NR=1> (UFCW Local 400 music video)

HANDOUT: STEPS IN TALKING UNION WITH NON-UNION WORKERS

Introduction

Be clear—who you are & why you're approaching them.

Identify their main issues and concerns

How do you like it here?... If you could change one thing at work, what would it be?...

Share the campaign's message

The concise, overall reason that you're talking with workers.

The "ask"

Something you're asking them to do...

Would you be interested in making this an even better place to work?...

Would you accept this card that has my contact info on it and be in touch with me so that we can talk further about making change here?...

I know you're busy, so I don't want to take up anymore of your time. Can I get your contact info so that we can talk further about making change here?...

HANDOUT: A COMPLETE HOUSE VISIT

1. **Introduction.** Explain who you are and why you're there.
2. **Issues.** Find out what this person cares about, what matters to them and what they'd like to change.
3. **Agitation.** Hone in on what moves them to act by encouraging anger and/or hope.
4. **Education.** Share about the UFCW and how having a union can make a difference.
5. **Call the question.** Ask if they support forming a union at their workplace.
6. **Inoculation.** Prepare the worker for the boss's reaction to them organizing; explain what's likely to happen next.
7. **Assignment/follow up plan.** Provide doable tasks to move the campaign forward.

The way we introduce ourselves on the doors is very important- we typically only have one chance at the door, and this will impact our ability to connect further with the worker.

Steps for Success at the Door:

1. **Introduce ourselves.** Our name and an easy to understand definition of the union—i.e. not just "the UFCW", but "the grocery store workers' union," "the meatpacking workers' union," or "the retail union," etc.
2. **Explain why we are there.** Clear and concise—some of your co-workers want to improve things by forming a union.
3. **Create urgency.** It is important that we talk.
4. **Ask to come in.**

Tips for talking with workers: Trying to have a real conversation with people where you gain their trust and empower them to take action can be challenging. These tips can help you to stay on track.

Remember the 3 C's:

Clear. Choose words that are understandable and get to the point.

Concise. Try to say things once and as simply as possible.

Concrete. Use specific examples (your personal story), when asked questions.

Introducción

Sea claro: quién es usted y por qué se está acercando a ellos.

Identifique sus asuntos y preocupaciones principales

¿Cómo se siente aquí?... Si usted pudiera cambiar una cosa en el trabajo, ¿qué sería?

Comunique el mensaje de la campaña

La razón concisa y general por la que usted está hablando con trabajadores.

El "pedir"

Algo que usted está pidiéndoles que hagan...

¿Le interesaría a usted hacer de éste un lugar aún mejor para trabajar?...

¿Aceptaría esta tarjeta que tiene mi información de contacto y se mantendría en contacto conmigo para que podamos hablar más sobre realizar cambios aquí?...

Yo sé que usted está ocupado, así que no quiero robarle más el tiempo. ¿Me puede dar sus datos para que podamos hablar más sobre realizar cambios aquí?...

1. **Introducción.** Explique quién es usted y por qué está ahí.
2. **Asuntos.** Averigüe qué es lo que interesa a esta persona, qué le preocupa y qué es lo que quisiera que cambiara.
3. **Entusiasmar.** Concéntrese en lo que los motiva a actuar, estimulando enojo y/o esperanza.
4. **Educación.** Hable sobre la UFCW y cómo el tener una unión puede mejorar las cosas.
5. **Concluya solicitando una decisión.** Pregunte si apoyan la organización de una unión en su lugar de trabajo.
6. **Preparación.** Prepare al trabajador para la reacción del jefe a que ellos se organicen; explique lo que es posible que pase después.
7. **Plan de asignación/seguimiento.** Proporcione tareas realizables para hacer avanzar la campaña.

La forma en que nos presentamos a la puerta es muy importante: típicamente sólo tenemos una oportunidad en la puerta, y ésta afectará nuestra habilidad para conectarnos más con el trabajador.

Pasos para tener éxito en la puerta:

1. **Presentarnos.** Nuestro nombre y una definición fácil de comprender de la unión, es decir, no sólo "la UFCW" sino "la unión de trabajadores de tiendas de abarrotes", "la unión de trabajadores de empaadoras de carne", o "la unión de ventas al menudeo", etc.
2. **Explique por qué estamos ahí.** Claro y conciso: algunos de sus compañeros de trabajo desean mejorar las cosas formando una unión.
3. **Transmita una sensación de urgencia.** Es importante que hablemos.
4. **Pida pasar.**

Consejos para hablar con trabajadores: Puede ser difícil intentar mantener una conversación real con gente, en la que se gane su confianza y los habilite para realizar acciones. Estos consejos le ayudan a mantenerse enfocado.

Recuerde las tres "C":

Claro. Elija palabras que son entendibles y vayan al grano.

Conciso. Intente decir las cosas una vez y tan sencillamente como sea posible.

Concreto. Use ejemplos específicos (su historia personal), cuando le hagan preguntas.