

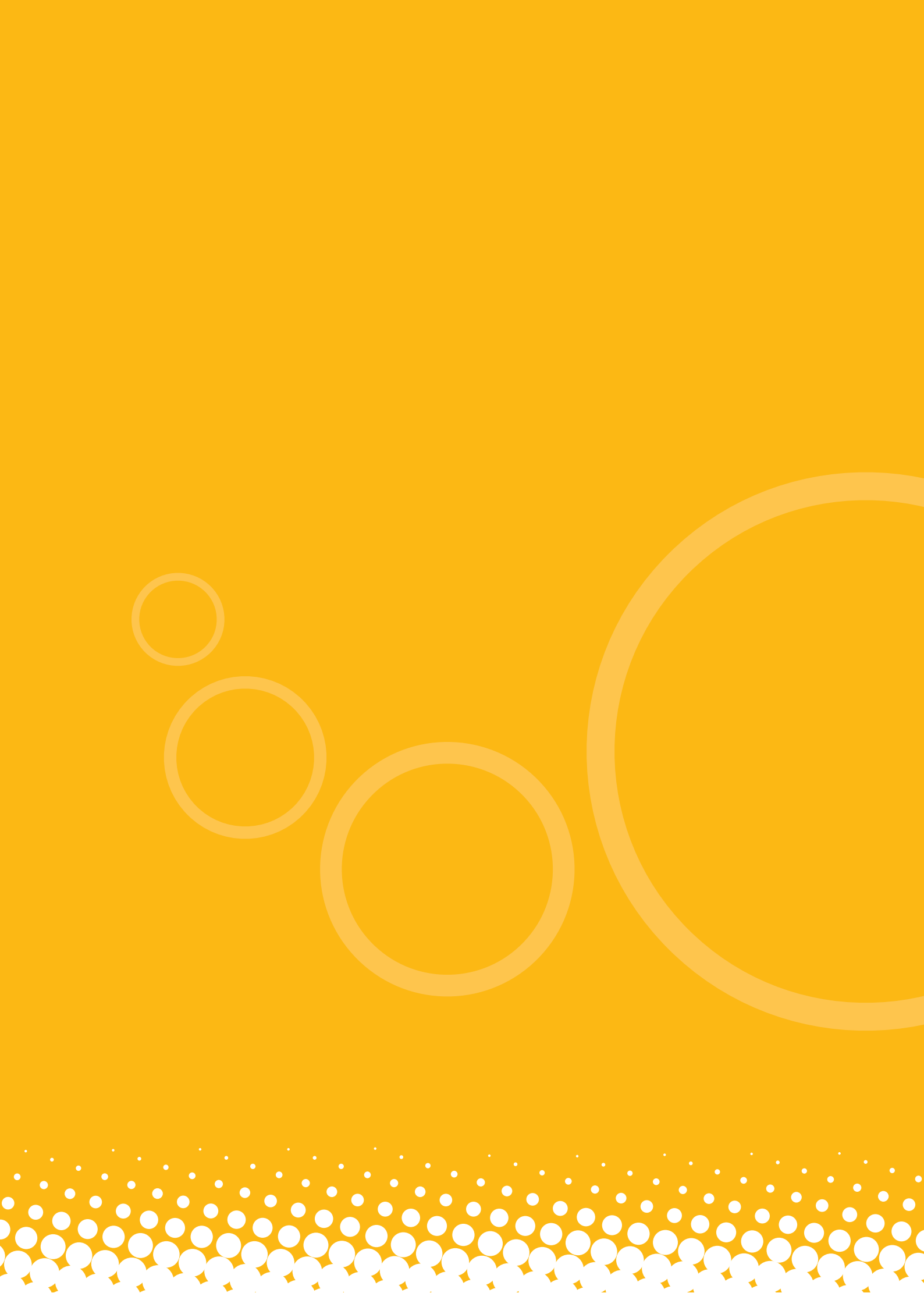
TUC 

 *rganise!*



# GUIDE TO ORGANISING

A framework for planning, implementing  
and winning organising campaigns



## Introduction

*Unions are constantly facing new challenges in the UK. How can we maintain union density after more than two decades of almost constant decline? How can we grow our membership in the expanding service sectors of the economy? How can we campaign effectively on the issues that matter most to our members and their families – both within the workplace and beyond?*

But with these challenges come new opportunities too.

- **Recent successful union efforts to organise migrant workers, in sectors as diverse as construction and contract cleaning, show that there are no 'no-go' areas for unions.**
- **Union-led projects on lifelong learning and skills are helping unions identify new activists and reach out to non-members.**
- **Continued investment in organising for growth means that union membership is slowly, but steadily, increasing in new sectors.**

This *Guide to Organising* aims to help unions build on these new opportunities. It offers a framework for planning, implementing and winning organising campaigns based on practical experience, proven best practices and research around organising unions in the UK and internationally.

The focus of this guide is organising to secure union recognition in greenfield campaigns and 'in-fill' campaigns, or campaigning around pay and other issues. While the specifics of every campaign will be different, this guide applies the key principles that form the basis of successful campaigning and organising. The most successful organising campaigns adapt best practice approaches and tailor them to the realities of each unique setting.

The guide highlights the need for leading organisers to have a clear idea what it is they, and, most importantly, members, want the campaign to achieve. Is the main issue pay, terms and conditions? Or is it about respect at work and a healthier relationship with the employer? Do members want new opportunities to develop or progress at work, or are more flexible family-friendly working arrangements the priority? Whatever the end objective, this guide sets out how organising can support members to get a better deal at work by building effective workplace organisation and running smarter, strategic campaigns.

One final note of caution. This guide is a work in progress that we plan to revise and extend over time, thanks to the input of union organisers and activists. If you would like to make any comments about the guide, suggest amendments or additions or discuss its contents, please feel free to contact me. Let me know how your campaigns progress and whether or not you found this guide useful.

***Alison McGarry***  
***National organising, training and consultancy officer***

## ***Key elements of the approach outlined in this guide are:***

- ***Strategic targeting to help unions choose the most appropriate campaigns***
- ***Comprehensive research and analysis of the target company or sector***
- ***Developing a rigorous campaign plan which includes benchmarks and performance measures to enable the campaign's progress to be monitored***
- ***Finding and training workplace leaders, reps and activists***
- ***Developing representative and effective organising committees, giving members ownership of the campaign***
- ***Developing campaigns focused on:***
  - ***One-to-one contact inside and outside of the workplace***
  - ***Involvement of current members in organising new members***
  - ***Issues which resonate in the workplace and, where appropriate, the wider community***
- ***Anticipating the response of the employer and developing a campaign to fit that response***
- ***Coherent campaign and media messages that promote the reasons for unionising even in the face of potential negative campaigns.***

## Stage 1.

# Choosing the right target

The starting point of strategic organising is choosing the right target. Too many good organisers spend large amounts of time and effort running campaigns that are unwinnable or strategically unimportant. Few unions would want to choose 'non strategic' targets but unfortunately some do. Sometimes we can be more concerned with addressing the question of **how** we will run a campaign rather than the wider, and more fundamental question, of whether a campaign **should** be run in the first place.

Key questions to ask when deciding on a target include:

○ ***Does the target fit the union's wider strategic objectives?***

Put crudely, if you aspire to be the leading union in sector X, should you be putting your limited resources into organising a company in sector Y?

○ ***Does it make financial/strategic sense to take on the chosen target at this particular time?***

This shouldn't be a straight cost-benefit analysis. You should be aware of the campaign's likely costs and returns. These could be financial, or less tangible but perhaps more important returns, such as the strategic position of the union.

○ ***Can your union commit the financial and staff resources required to win the campaign – have you got the bite to back up your bark?***

○ ***Are you making an informed decision?***

Often we choose targets based on assumptions, rather than hard analysis.

Do we really know enough about Company X to launch our campaign? (The next section addresses these issues in more detail)

○ ***If we 'won' this campaign, what difference would it make?***

Would we improve the terms and conditions of the workers involved?

Will it positively benefit our existing members?

○ ***What are the potential pitfalls this campaign could uncover?***

Organising campaigns must be strategically chosen. Some unions have more resources than others do, but no union has the resources to run campaigns with little or no chance of success, or of limited wider benefit to the union. The size and scope of a target should correlate with the resources available to the union and the knowledge and experience of the officers and lay union organisers who will work on the campaign.



## Stage 2:

## Research<sup>1</sup>

Good, systematic research is important to inform both the targeting process and the development of the campaign. In some unions, researchers working closely with organisers will carry out this comprehensive research; in other unions, organisers will have to do this job themselves. Whoever does it, this basic job of building a comprehensive understanding of the target company and sector is critical. Analytical research is the cornerstone of a successful organising campaign – even if the campaign is to be a small one.

Space prevents this guide from giving detailed instructions on how to research a target company/organisation/sector comprehensively, but below are some of the key elements to consider when preparing a campaign<sup>2</sup>.

As well as detailed information about the company/organisation you are targeting, you will want to know about responses to previous organising efforts or campaigns and the likely response of the employer and the workforce to your planned campaign. Your information sources should include:

### **People**

Contacts, members and activists within the company/organisation should be your first port of call. These are the people who really understand how the enterprise works and what the key organising issues are likely to be. In situations where the company/organisation is likely to be hostile to your organising efforts you will need to make sure that you do not compromise those who have helped you. Treat the information they provide confidentially and ensure that it is used sensitively.

Beyond contacts, members, activists and organisers, you should also speak with officers and organisers who may have information about your target company. Maybe they have undertaken an earlier organising effort, or have a relationship with the company/organisation at another site or in another country. Make sure you include obvious sources of information and experience.

<sup>1</sup> Much of the material in this section is derived from work undertaken on behalf of the TUC by Paula Hamilton and Jane Holgate. Additional material, including the framework for research, is based on work by Kate Bronfenbrenner and Tom Juravich.

<sup>2</sup> In 2007, the TUC will be developing a 'Strategic Research' training programme and supporting materials for union researchers and senior organisers. The TUC Organising Academy also runs a 'Strategic Campaigning & Organising' training module for union organisers involved in this work. For more information about any of this work contact Ebony Tapper in the TUC's organising team (e: [etapper@tuc.org.uk](mailto:etapper@tuc.org.uk))

Other potential sources of information might include managers and others working elsewhere in the sector, especially in those companies or organisations where you already have recognition and/or a relationship with the employer. With all these contacts it is vital to use discretion and treat any information received confidentially. In the majority of cases, you will not want to advertise the fact that you are preparing your organising campaign, so again, exercise discretion.

### ***A company's own publications***

If you have a recognition agreement with the target company/organisation use the union's right to request information for collective bargaining purposes. Even if you do not have recognition, remember that companies and organisations produce useful publications for members of the public, shareholders, customers and other stakeholders. Annual reports, company websites, marketing brochures and so on can include information sources that you can use to inform your campaign. Such literature is in the public domain.

### ***Government and public records and publications***

Employers interact with government on a daily basis. Sources of information can include business licenses, planning applications, court records, public agency accounts and records and inspection reports. Most of these records will be available (perhaps at a small charge) under the provisions of the Freedom of Information Act (FOIA)<sup>3</sup>. Before looking for this material draw up a list of what potential interactions with government or public bodies and agencies your target employer may have had. Has your target employer bid for and/or won public contracts? Are they subject to licensing, for example under the provisions of the Gangmasters' Licensing Act? Are they likely to have been subject to enforcement action by the Health and Safety Executive or National Minimum Wage Enforcement Unit?

The FOIA is new and largely untested. You do not have to say why you want the information or for what reason you want it. Organisers and researchers should be prepared to push the boundaries of what information may be released and find creative ways to use the Acts.

### ***Other sources of information***

The internet puts a vast range of additional information sources at the fingertips of the organiser/researcher. Newspapers, news services, business journals, online directories and databases can all provide invaluable sources of information.

One thing to bear in mind when using the web, however, is that the quality and accuracy of information available can vary dramatically. Often the information you find will be out of date or undated, or just inaccurate, so do double-check it first (this is especially true if you are using the information in public documents such as campaign material or publicly available reports).

Paid-for services such as Lexis/Nexis will be more accurate, but can also be prohibitively expensive. The TUC Information Service (as well as your own union's research department) can give you advice on the best sources of information to support your research, and may be able to give you access to selected commercial data sources<sup>4</sup>.

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<sup>3</sup> There are two Freedom of Information Acts in the UK: FOIA 2000 (the UK Act) and FOI (Scotland) Act 2002. The 2000 Act is retrospective, so applies to historical documentation as well as that generated post-act. The Data Protection Act (DPA) limits how individuals may be identified in FOI disclosures, and there are exemptions to be aware of when making requests. In addition, the Environmental Information Regulations 2004 give similar rights to information regarding environmental issues.

<sup>4</sup> TUC Information Service email: [info@tuc.org.uk](mailto:info@tuc.org.uk)

## ***Research framework: What do we need to know?***

- ***Basic information on company form and structure***
- ***Products/services: What does the company/organisation do?***
- ***Facilities and property: What sites/workplaces are we targeting; will we have access?***
- ***Financial information: How is the company/organisation performing? What are the key trends in financial performance?***
- ***Company history and strategy***
- ***Corporate strategy/key operational relationships***
- ***Management: Who are they? What are their attitudes to unions?***
- ***Shareholders***
- ***Board of Directors***
- ***Lenders***
- ***Parent company***
- ***Subsidiaries***
- ***Industry/sector: What is the nature of the industry/sector?***
- ***Competitors: Who are the key competitors and do we have links/relationships/history with any of them?***
- ***Raw materials/suppliers***
- ***Transportation/distribution/dissemination***
- ***Utilities***
- ***Customers/clients: Who are the key customers and clients? Do we have links to any of them?***
- ***Health and safety: Have there been any significant problems/trangressions?***
- ***Environmental: What is their record like?***
- ***Regulatory oversight/legal***
- ***Links to and relationship with the wider community***
- ***Political activity or donations***

*Based on original work by Kate Bronfenbrenner and Tom Jurvaich*

## Stage 3.

# Campaign planning and preparation

Every campaign needs a detailed, flexible plan that all lead organising officers agree to implement in a structured way.

There are a number of activities that officers and organisers tend to do in every campaign out of habit, such as leafleting outside the workplace. Be disciplined – if this activity is not in the campaign plan it should not be done. To ensure maximum buy-in from everyone involved in the campaign the plan should, where possible, be devised and reviewed with an organising or branch committee that will implement it in the workplace.

When developing your plan, bear in mind the 'real-life' test. Your plan needs to be realistic, achievable and informed by the 'real-life' situation on the ground. Plans that fail the 'real-life' test often end up gathering dust on an organiser's bookshelf!

Critical elements of your plan should include:

### 1. Timeline

#### ○ **Establish a campaign calendar.**

Work back from the date you hope to conclude the campaign (for example when you hope to secure a collective bargaining agreement or gain recognition).

#### ○ **Set the pace for the campaign.**

Think about how you will build momentum during the campaign and escalate the pressure you can bring to bear over time.

### 2. Potential proactive and reactive strategies

#### ○ **Understand the employer's strengths and weaknesses and its likely response to your campaign.**

(this links back to the research stage discussed earlier).

#### ○ **Know the campaign's strengths and weaknesses.**

#### ○ **Consider whether you need to broaden the campaign beyond the workplace.**

Spell out your strategy for engaging the wider community. Decide who will be assigned to this work, who the key partners are to engage and why this campaign matters to the wider community.

#### ○ **Ask whether you need a media strategy.**

Who will take responsibility for developing it and taking it forward? What are the key campaign messages?

#### ○ **Try to anticipate the unexpected and consider how that could impact upon the campaign.**

### **3. Resources/budget**

- **Create a leadership and team structure.**

Establish clear lines of responsibility and management that everyone involved in the campaign understands.

- **Estimate the number of staff needed for each phase of the campaign.**

Running inadequately staffed campaigns is a waste of time and money.

- **Decide the number of volunteer organisers needed, when they will be needed, where they will come from, and how they will be trained.**

- **Set up campaign offices and meeting space.**

### **4. Benchmarks**

- **Establishing clear benchmarks at each stage of the campaign will allow you to assess the campaign's progress and ultimately determine whether the campaign should continue. One of the hardest things for a union to do is to make an objective decision about when to end a campaign that is not working. Who will take this decision? What process will they undertake before this decision is made?**

### **5. Scope of control**

As we devise the campaign plan, keep in mind that we must account for both the factors we cannot control as well as those that we can. Some factors that we cannot directly control include:

- **the competitive environment of the employer**
- **the legal system and employment laws**
- **the degree of initial worker interest and resistance**
- **workforce demographics**
- **employer opposition to the campaign**
- **the resources of the employer.**

Factors that we can and should control include:

- **resources allocated to the campaign**
- **timing of the campaign – when we start, and the pace of the campaign**
- **our key campaign messages**
- **public/private debates**
- **scale of the campaign**
- **campaign tactics**
- **campaign discipline**
- **our reactions to the management, the workforce and opportunities that are presented.**

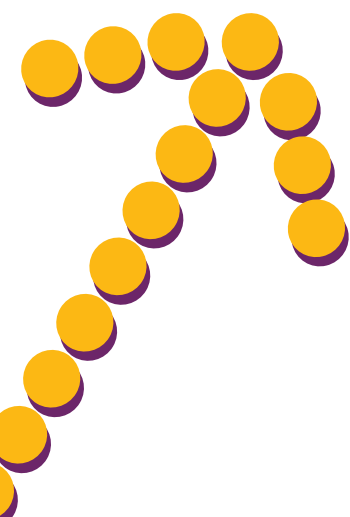
The TUC's organising team has produced a more detailed *Guide to Planning*. Order copies of this guide from Ebony Tapper in the organising team ([etapper@tuc.org.uk](mailto:etapper@tuc.org.uk)) or download from the TUC website at [www.tuc.org.uk](http://www.tuc.org.uk).



## ***Campaign planning***

Carefully plan the organising campaign before you begin.

- ***Build a comprehensive list of all workers, with home addresses, phone numbers if possible, and specific workplace information***
- ***Map work areas***
- ***Develop a robust strategy, a detailed campaign plan and benchmarks***
- ***Establish procedures for record-keeping***
- ***Identify resources from your national and/or local union for the campaign***
- ***Define the role and commitments of officers and representatives***
- ***Secure commitment from workplace leaders to the campaign strategy and benchmarks***
- ***Secure commitments from workplace leaders to a campaign focused on one-to-ones and membership actions***
- ***Evaluate community, shareholder and political pressure points, to use if necessary***
- ***Schedule your campaign with key events and activities***



## Stage 4.

# ***Finding and training workplace leaders, activists and reps***

Once you have identified your target and developed your initial campaign plan it is essential that you:

- ***begin to map out the target workplace***  
(a key component of this map will be building up a comprehensive and detailed list of employees and additional stakeholders)
- ***explore the interests and issues of member and potential members***
- ***identify potential leaders, activists and reps.***

Unless the union is certain that there will be no major obstacles to limit the campaign, it is essential to carry out the key job of identifying potential workplace leaders and activists with discretion and sensitivity. Prematurely signalling that you are launching a campaign or putting leaders and activists in the 'spotlight' before your campaign is ready is likely to have a negative impact on the campaign before it is up and running.

### ***Finding potential leaders***

Finding leaders and potential activists is one of the most difficult parts of any campaign. Take care and time to identify the key people. Speak to your contacts in the workplace. Who is it that people listen to and respect? Who is it people go to for advice and help at work? Who takes a lead in organising social or other informal activity in the workplace?

Remember, the best potential leaders are not necessarily the ones with the loudest voice or who have an obvious complaint, but these will often be the people who put themselves forward at the beginning of a campaign. Make enquiries and find out whether other workers respect these people. Are the grievances they hold widespread or individual problems? Could their involvement in your campaign backfire?

Remember too that not all workplace 'leaders' will be positive about the union. How will you handle these individuals? Can you co-opt them, or find some way to respond to their views?

Central to finding the most respected workplace leaders and activists will be finding an opportunity to have a proper discussion with them. Where workplace access is a problem this is easier said than done. If you cannot have these discussions in the workplace, try to set up external meetings in an environment where the potential activist is comfortable. One-to-one meetings with initial contacts should also be used to help you gather information – lists, maps, work schedules, issues – and identify other potential leaders.

The best way of identifying potential workplace leaders and activists is to give them something to do. Give short-term, measurable tasks to potential leaders, activists and reps. Do they deliver? Are they the sort of person who will play a key role in the campaign? Processes should be put in place that allow organisers to evaluate all identified workplace leaders and identify their level of support for the union, their contribution to the campaign and any training and development needs they may have.

### ***Open meetings***

It is always tempting to start a new campaign with a (hopefully) large, well-attended open meeting. This may be appropriate when you are focussing on in-fill organising, or are campaigning around an issue such as pay in a workplace where you already have recognition. However, in most recognition campaigns it does not make sense to hold these sorts of meetings until you have developed a strong membership base and an effective collective group representing the workforce has been developed.

## ***One-to-ones***

With an expanded and trained workplace organising committee, you will want to reach out to all workers through one-to-one contact.

- ***Initiate one-to-one contact with network members and non-members***
- ***Listening to workers is the key to effective one-to-ones***
- ***One-to-ones will help clarify issues, identify additional leaders and lay the groundwork for future worker actions***
- ***One-to-one discussions should result in an assessment of the worker's likelihood of joining the union and participating in workplace activity and actions***
- ***Maintain a consistent message that is directed to workers in the 'middle' – not workers who are already committed to the union***
- ***Signing membership forms should be a product of the activity, and not the main theme of a campaign***
- ***Use employer inductions where possible to introduce employees to the union***

## **Stage 5.**

# ***Building workplace and branch organising committees***

An effective workplace organising committee, which represents the whole workforce in both greenfield and recognised sites, is essential to success. While each campaign will vary, workplace organising committees will normally mirror the workforce with a representative demographic/departmental makeup. Workplace organising committees need to be made up of workers who are committed leaders, and not just those who show up to a meeting. They must have the ability to communicate with and move co-workers to action.

While a paid organiser or officer may initially take the lead role in the development of a workplace organising committee, the committee needs to own the campaign and all of its major decisions. The committee will build the campaign through the strength of their conviction, their positive and assertive attitude, and by taking action together, providing their co-workers with a sense of shared campaign ownership.

## ***What workplace organising committee members need to know***

- ***The campaign plan, benchmarks and timeline***
- ***The elements of a successful one-to-one***
- ***How to get an employee to sign a membership form***
- ***How to make an accurate assessment of the employee's attitude to the union***
- ***Appropriate recognition procedures***
- ***Employer information***
- ***Potential anti-union stakeholder action and how best to counter it***
- ***How the union works and its structure***
- ***How the union can help solve problems in the workplace through collective bargaining***
- ***Employee rights***
- ***The role of committee members***
- ***All of the relationships in the workplace – both formal and informal***

Once workplace organising committee members are recruited, they will need to be trained and motivated during the campaign. Training and education on the union campaign plan should include anticipating anti-union actions both within and outside of the workplace.

Committee members should undertake tasks, gradually increasing in responsibility, difficulty and visibility. Their primary tasks at the initial stages of the campaign are identifying and recruiting other leaders, obtaining leave and work schedules, establishing the list of employees, helping to map the workplace, and beginning to build a communication network.

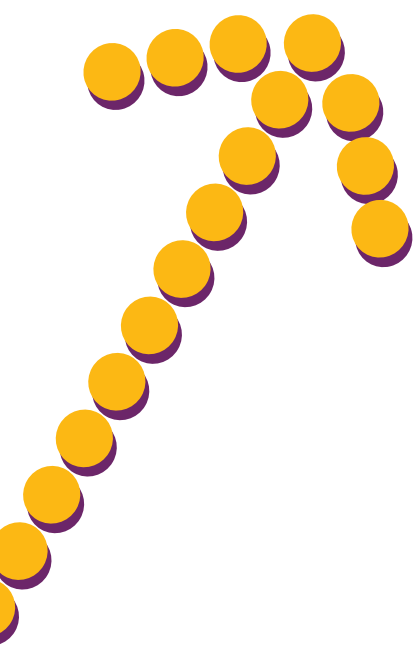
The workplace organising committee must continue to grow as new workplace leaders are recruited. The effectiveness of the committee depends on it being composed of real and potential future leaders who are trained to communicate with both the workforce, union and the employer and to make the most accurate campaign assessments and move their co-workers to support in the most effective way.

A campaign is likely to be less effective without a workplace organising committee that is holding informal discussions with co-workers to gauge the level of support for the union. In some unions, the goal is to have at least 60 per cent of the workforce identified as being potentially pro-union before the campaign goes public.

The organising committee should look for opportunities to convince co-workers to join the union, particularly when co-workers are talking about issues or concerns – or to start those conversations. Union organisers need to continually stress the need for confidentiality and committee members should also continue to identify which workers are pro and anti-union. If the committee cannot assess a strong majority as likely to be pro-union, it may be advisable to stop the campaign before it goes public. Identifying the level of worker support while pushing forward the campaign is tricky, but essential.

At this stage in a greenfield campaign the union needs to know the scope of the potential bargaining unit and be aware of what alternative bargaining unit composition the employer might propose. The union should be prepared to win recognition in the largest “worst case” bargaining unit that the employer might propose. This means it is even more important to obtain accurate employee lists, chart the workplace and document previous union history and the employer’s operations.

Beware of the campaign emerging with a partial, unrepresentative committee: workers and management might respond by thinking it is led by a minority clique rather than a true leadership group. It takes time, planning, and growth through action to ensure the workplace or



branch committee is composed of members who are respected by their peers.

It is important not to forget another valuable resource: current union members. Involving existing members from other workplaces in organising campaigns has many benefits:

- ***it allows organisers to talk to many more workers***
- ***other members may be able to talk from real-life experience***
- ***it builds the union's wider capacity to support organising.***

However, having effective member involvement requires dedicated union staff resources to train and prepare these members.

Members can be trained as volunteer organisers to do one-to-ones at key times in campaigns. Other members can join meetings, rallies or demonstrations to support organising campaigns. Still others can help with administrative duties, including office tasks and phone calling.

Identifying the strengths and weaknesses of member organisers or volunteers before they are brought onto organising campaigns is essential. Just because someone is a good rep or activist does not mean they will be an effective volunteer organiser. Identifying effective volunteers through a training programme (or through TUC organising training) will avoid both organising and political difficulties.

## ***Responsibilities of the workplace organising committee in the campaign***

- ***Identify trainable and trustworthy leaders***
- ***Ensure where possible that the committee represents a broad range of work locations, departments, job titles, shifts, ethnicity and gender***
- ***Get employee lists, addresses and phone numbers, and map the worksite***
- ***Repeatedly evaluate the union's strength in work areas and departments***
- ***Identify majority support before breaking the campaign***
- ***Agree on priority issues and campaign messages***
- ***Agree/finalise campaign plan and delivery, including evaluation***
- ***Identify and plan for potential bargaining unit composition issues where appropriate***
- ***Provide leadership by actively supporting the union – educating, motivating, challenging, uniting and activating co-workers***
- ***Identify other leaders to recruit to the committee***
- ***Continually assess the worker's commitment to the campaign***
- ***Convey a sense of worker's ownership of the union by ensuring workplace reps take part in planning and carrying out the activities of the campaign – the union should not be seen as a "third party"***
- ***Serve as a communication network. Besides being the eyes and ears for the campaign, committee members should choose specific employees to communicate with and develop***
- ***Keep a close watch over the campaign and its tactics – observe both union the employers***
- ***Distribute literature, sign up co-workers and make one-to-ones. Committee members – not union officers – are the ones who get membership forms signed***
- ***Turn out co-workers to meetings and events***
- ***Speak for the campaign in public and with potential community and political allies where appropriate***

## Stage 6.

# *Intensifying the campaign*

To grow union membership workers must own their organising campaigns. Therefore, throughout the campaign there should be a series of increasingly visible activities demonstrating support for the union. These activities should show the strength of union support, build the self-confidence of union supporters and help identify each worker's commitment to the union. They will help develop self-confidence and show undecided workers the majority sentiment of the workplace.

The plan should start with easy activities and should be flexible enough to take advantage of opportunities that arise during the campaign for additional support activities. For example, requesting recognition is a good opportunity to make visible the support the union has, by having a public action.

Examples of workers showing support for their "union" include:

- ***T-shirt or badge days***
- ***Organising workers to meet with supervisors over issues (using the employer's personnel policies or handbook)***
- ***Mass leafleting or human bill-boarding.***

It is important that these activities are well planned. Workplace organising committee members should assume responsibility for recruiting co-workers for the actions. The organiser must keep track of who was expected to participate and who actually did, so they can evaluate their reading of the workers' commitment to the campaign. This will help the union shore up its internal communication and identify which areas need more attention.

It is also important to remember that actions should give members ownership of the campaign. Union officers passing out T-shirts in front of the workplace is not the same as having a majority of the workers show up for work one day wearing their union T-shirts. We want the workers to own the actions and carry them out themselves – not be passive recipients of officer-generated activities. Often the most empowering action for a union supporter is a one-to-one with an undecided co-worker that results in more support for the union.

Building union density and capacity is at the heart of organising. Workers are attracted to an organisation that has overcome difficulties and has a focused, articulate message.

Over the course of any campaign, the number of workers willing to participate in activities should increase. Organisers need to ensure that workplace activities give the appearance and feel of positive union momentum. If activities fizzle or appear to be losing momentum, the campaign is potentially lost. Activities and action must be connected to planned end results.

Actions can also backfire if they do not involve the weak union supporters and the undecided. Discuss with them and win their support; do not alienate them. We have to be careful not to polarise the workforce by planning activities that make the most committed workers feel good, but turn off those in the middle.

## ***Organising worker actions***

- ***Campaigns should start with worker actions that have clear and achievable goals that escalate as membership strength is built***
- ***A strong turnout for union actions is key to a successful campaign***
- ***Support and concrete participation across the workplace ensures that actions can be translated into workplace gains***
- ***Union action plans should always include a clear strategy to achieve outcomes in the workplace***
- ***Community/political and other alliances should be built to support workers and pressure the employer, if needed***

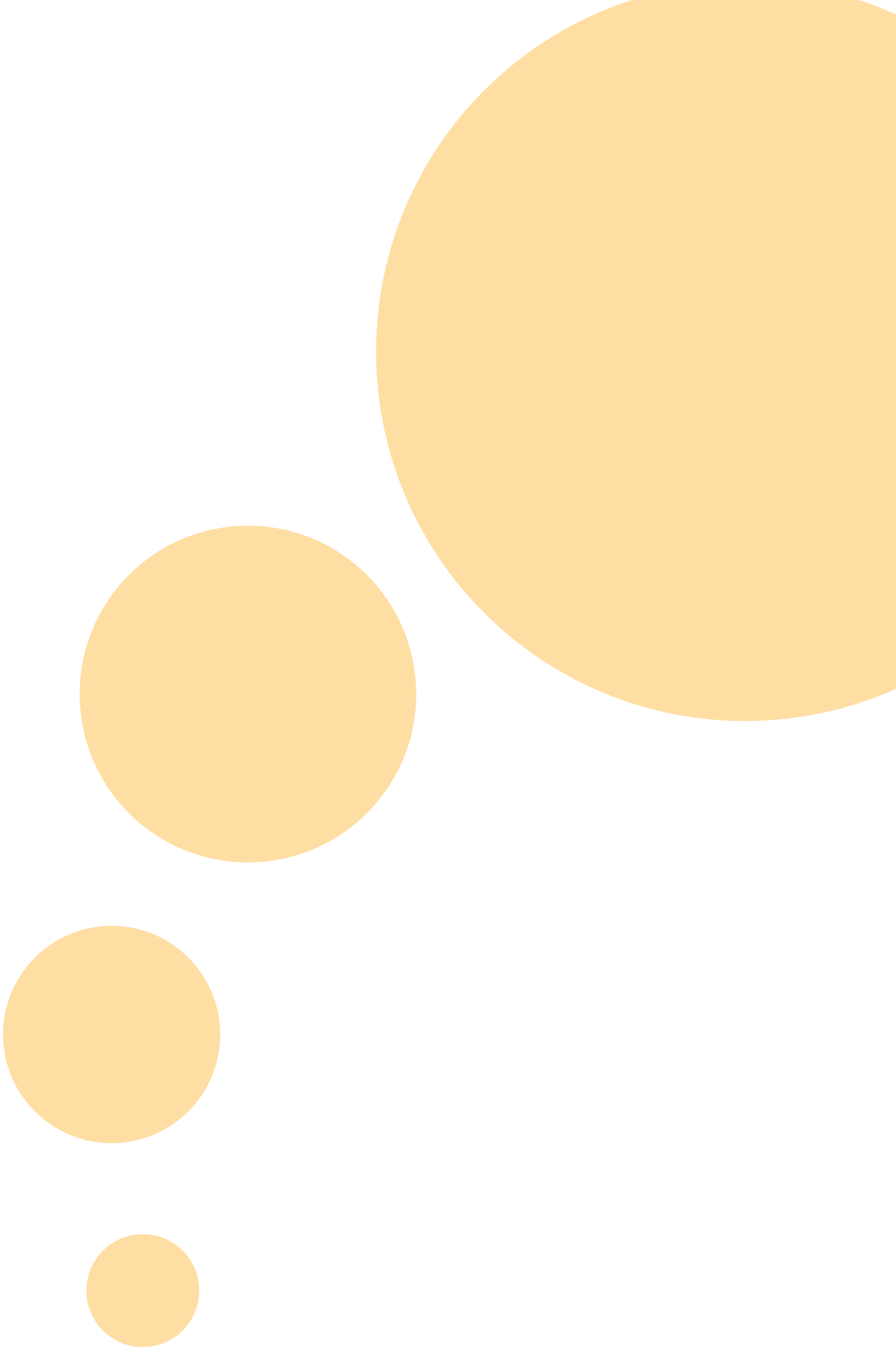
### ***Driving the message home***

The union's message must be focused and repeated and should be delivered by the workplace organising committee and other supporters. The message needs to appeal to the middle group of workers (those undecided but not anti-union). It needs to have a positive focus and be delivered in language that is reflective of the workforce. The campaign should have a clear theme that resonates with the workforce and it should be repeated consistently and often.

Be careful about building the campaign around one or two specific issues, like a negative manager or too small a pay rise. Broader themes such as "Justice, Dignity, a Voice at Work" and "Respect" can resonate with both the employee and the employer but they must be set in the context of real-life workplace issues. Make sure the issues and themes articulate shared workplace concerns and the need for collective answers and action. Stay on message. Keep the discussion on union issues.

The best method of message delivery is one-to-one communication. Reliance on written materials means the campaign is not organised well enough to maintain strong majority support.

***Do not make promises about specific issues that the union cannot deliver. Unions cannot guarantee a voice in the workplace, influence over pay and working conditions, the ability to sit down with management as equals and so on – even in the most effective employee/employer relationships. Unions can say: "Here is what other workers like us were able to win with their union in other workplaces". Nevertheless, we have to be clear that union members determine and negotiate their own deal and it is up to them to decide what they want and how to win it through collective bargaining.***



## Stage 7.

# Promoting the campaign

Broadly speaking, the union is in a position to promote the campaign publicly and strongly when:

- *there is a workplace organising committee in place that represents a significant percentage of the workforce (balanced by department, job title, ethnicity, etc)*
- *the committee understands the campaign plan and their role*
- *the workforce and workplace has been meticulously mapped*
- *the majority of the workforce is preliminarily assessed as potentially supportive.*

The campaign's profile will be enhanced by the committee taking a visible action (signed leaflet or letter, mass leaflet), followed quickly by a one-to-one operation (blitz) to contact all the workers in the workplace in a very short time

### **Building majority support**

We cannot win campaigns without building strong majority support. For example, some UK unions feel recognition should not be requested without at least 60 per cent of the potential bargaining unit signing membership forms. Other unions are not so prescriptive. However, the underlying principle is the same – if the union does not have clear majority support think carefully about how, or even if, you should progress the campaign.

The purpose of getting workers to sign forms is to get a commitment to the union. Whether our goal is to win recognition or strengthen an existing collective agreement, if we cannot get someone to sign a membership form, it is unlikely we will get his or her support.

Committee members should continue to get membership forms throughout the course of the campaign and re-evaluate areas of the workplace with the lowest assessed support. These areas should be placed first on the priority list for intense organising. If we make gains here, our “better” areas will follow more easily. Go for the “biggest and worst” first.

In order to build and maintain a strong majority, gear the campaign towards the weak union supporters and the undecided. Campaign issues and messages should appeal to them and build unity among the workforce. Activities should be designed not to scare or alienate them, but to demonstrate the strength of the union and draw them in. Committee members and organisers will need to focus their one-to-one and attention on these less committed groups of workers.

## ***Checklist for promoting the campaign***

***– Ensure there are ticks in all boxes before moving forward***

- Do we have a workplace/branch organising committee representing the majority of the workforce, which is representative of ethnicity, gender, department, job title, etc?***
- Do we have a strong committee that is united and gaining support from co-workers?***
- Is the committee able to articulate the message about why they want to grow the union?***
- Do we have the majority of the addresses of the workplace/bargaining unit?***
- Do we have the majority assessed as strongly supportive?***
- Is the workplace/company mapped?***
- In greenfield campaigns, have we defined the potential bargaining unit, and the least desirable bargaining unit the employer might propose?***
- Do we have a plan for how the union committee will develop and how the campaign will be promoted?***
- Do we have a plan for rapidly circulating and collecting workplace information?***
- Do we have a plan for personally contacting every worker in the workplace/unit?***
- Do we have the support staff and resource capability for supporting an organising blitz?***
- Do we have the community/political/other workplace support for the campaign in place?***

***The campaign will require intensification when the recognition ballot or collective bargaining talks are about to take place. In this environment, the committee will need to continue to:***

- contact all workers***
- initiate surveys, petitions etc when and where appropriate***
- collect and analyse results from petitions, surveys and membership forms – move quickly, re-evaluate, and set clear membership targets and campaign benchmarks***
- escalate these activities when required***
- counter any opposition by inoculating workers and build client/community/political/other workplace support where required***
- target the “middle third” of workers***
- continue one-to-ones***
- put out messages with workers’ actions, faces, signatures or voices***
- continue objective evaluation of the campaign.***

## Stage 8.

# Finishing the campaign

The organising campaign is only the first step in building the union. To consolidate the union's position workplace activities must continue as part of the long-term campaign plan.

The final phase of the campaign requires meticulous planning to consider who will lead future workplace negotiations, collective bargaining agreements and continue to grow the union. These decisions need to have been made at the start of the campaign. A transition – from union officers to workplace representatives leading the workplace union – needs to be built into the campaign plan.

## Moving forward

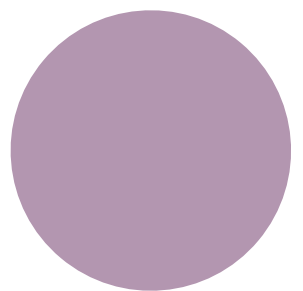
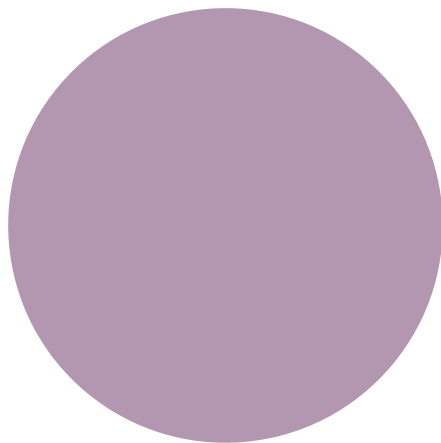
### **Recognition campaigns don't finish at recognition**

- **Remember that preparing for the collective bargaining agreement starts at the beginning of the campaign and takes on a life of its own after the recognition agreement.**
- **The goal of the campaign is not recognition, but the first bargaining improvements in the workplace agreement.**
- **Rebuild momentum of the campaign.**
- **Prepare a transition plan – from union officers to workplace leaders.**
- **Reach out to non-union supporters.**

### **Consolidating members**

Once a successful campaign have been executed, the union must work to maintain its strength and make the principles of organising part of the culture of the union, in order to:

- **achieve membership growth goals**
- **integrate new leaders and members into the union**
- **translate worker action into workplace change**
- **maintain regular one-to-one communications**
- **continue union involvement in new employee induction programmes**
- **contact workers who drop their membership**
- **make organising a continuing priority for the union.**



## **Conclusion**

***This manual advocates a systematic organising approach to support UK unions' approach to organising. It does not provide a definitive blueprint, recognising different unions' discrete cultures and organising methodologies. However, the foundations of any organising campaign are adequate resources, skilled organisers, representative, active workplace/branch committees, and detailed strategic and operational plans. Each stage in the manual is intrinsically important to a successful integrated organising campaign.***

Without allocating adequate and appropriate resources to organising, unions will be unable to staff and finance the labour-intensive workplace interventions that a strategic organising campaign requires; they will be unable, for example, to conduct in-depth research on company ownership, recruit and train staff, members, volunteers, and organising committee members and engage in escalating pressure tactics in the workplace and wider community.

A representative and active workplace committee is necessary to develop local workplace leadership, build the union inside the workplace and make connections between workers and the community outside the workplace.

Finally, without benchmarks and assessments, the union will be wasting resources as it will be unable to evaluate the effectiveness of the campaign and decide when, whether, and how best to move forward with the campaign.

## **Useful TUC publications**

### ***The Hidden One-in-Five: Winning a fair deal for Britain's vulnerable workers***

As many as 20 per cent of the UK workforce are at risk of exploitation due to their employment status, ignorance of their rights, or lack of information in their own language. This report, by the Policy Studies Institute for the TUC, outlines the problems and makes the case for better rights for agency workers and others in precarious employment.

**2006, £5**

### ***TUC Guide to the Information and Consultation of Employees Regulations 2004***

These new regulations are an aid to recruitment and a potential means of extending union influence in the workplace. Mark Hall has written an invaluable guide for the TUC to what the Regulations say and how unions can take up the opportunities they offer.

**2005, £8 [£4 unions]**

### ***Bargain or bust? Employer responses to union organising***

This new addition to the Organising the Future pamphlet series presents original evidence on the response of British employers to union organising under the statutory recognition procedures established by the Employment Relations Act 1999.

**2003, £6 [£1.75 unions]**

### ***The Fruits of Our Labour: Outcomes of the new union recognition agreements***

Outcomes of the new union recognition agreements up to 2003.

**2003, £6 [£1.75 unions]**

### ***Planning for Organising***

A guide for unions.

**2005, Free**

### ***Representing Workers: Trade Union Recognition and Membership in Britain***

Worker representation has traditionally been dominated by trade unions, but with the decline in union membership other forms of representation are increasingly significant. This timely study tackles subjects such as trends in union membership, young workers and unions, non-union forms of representation, and how to enhance the appeal of unions.

**2003, £19.99 [£14.99 unions]**

### ***A perfect union? What workers want from unions***

This third report on the broad theme of Reaching the Missing Millions explores the scale of the membership challenge facing unions, reports new findings on what makes for effective union organisation and bargaining and explores employer attitudes to unions.

**2003, £7**

### ***Reaching the Missing Millions***

A hard hitting report, based on extensive research, which provides insights into how trade unions can reach their full membership potential. It sets out a number of initiatives that provide a new model of unionism for groups of workers not currently reached by unions.

**2001, £5**

### ***What Workers Want from Workplace Organisations***

A report to the TUC's Promoting Trade Unionism Task Group, written by two distinguished research academics. This report is the most extensive poll of workers and their attitudes to their job, trade unions and their employer, that has been conducted in the UK for many years.

**2001, £5**



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