

INTERNAL ORGANIZING TECHNIQUES

MODULE 4

FINDING, RECRUITING AND MAINTAINING LEADERS

OBJECTIVES:

- Identify characteristics of natural leaders.
- Identify basic recruitment principles and approaches.
- Understand the importance of nurturing and providing support in the leadership development process.
- Consider 'mentoring' as a natural process of leadership development.
- Distinguish between two leadership styles and their impact on developing new leaders.
- Provide an opportunity for participants to assess their own leadership style.
- Analyze case studies to determine leadership potential and need for recruitment.

MATERIALS:

Local 809 Case Study – Recruitment in Local 809 – Document #10 in Workbook
Leadership Style Questionnaire – Document #11 in Workbook
Group Case Studies – Document #12, #13, #14

ACETATE – Keeping Activists Motivated
Overhead projector
Flip Charts
Markers

METHOD:

- Facilitator Led Discussion
- Identifying Potential Activist/Leaders – 15 minutes
- Identify Basic Recruitment Principles – 30 minutes
- Recruitment – Local 809 Case Study – 20 minutes
- Mentoring, A Natural Process of Leadership Development – 10 minutes
- Leadership Assessment Questionnaire – 20 minutes
- Case Studies on Recruiting and Finding Leaders – 30 minutes
- Report Back to Plenary – 15 minutes

FACILITATOR RESOURCE NOTES

- Facilitator Led Discussion
- Identifying Potential Activists/Leaders – 15 minutes

Facilitator recaps discussion in Module 1 outlining the basic skills of an organizer. Refer to notes below.

- One-on-one communications skills.
- The ability to recognize an organizing opportunity.
- The ability and patience to plan all activities.
- The ability to recognize leadership potential.
- An understanding that organizing is not a one-time activity but a continuous process which never ends.

Finding, recruiting, and developing activists becomes one of the primary tasks and skills a steward needs to develop in order to build a strong union presence in the workplace. Most of us probably know of stewards in the union who are vocal and knowledgeable about union issues but who never, ever think to recruit or bring along anyone new to union activity. These stewards, while they may be valuable to the union because of their technical experience and skills, are not recruiters and therefore they aren't organizers.

Stewards and other union leaders who think it is easier and more efficient to do everything themselves give up important opportunities to recruit potential activists, and in effect deny members the chance to have some involvement, however small, in their own union.

Continually recruiting members and getting them involved in doing things, no matter how small the task, is the essence of an organizers job. When more members become involved in taking responsibility for planning and doing things in the local the more they begin to feel they have some ownership of the local and the greater commitment they will have to their local.

The more stewards do on their own without involving the membership the less ownership members feel and the less committed they are to their union.

When recruiting new activists, stewards should take a good look at their own work group to assess the leadership potential among their own co-workers.

Ask participants if they can identify one worker in their workplace who possesses leadership qualities but is not identified or presently involved in the Union.

Among those who identified potential leaders in their workplace ask two or three people to describe what it is about these 'informal leaders' that separates them from the rest of their work group.

Note on the Flip Chart participants descriptions of what is different about these informal leaders.

As the Facilitator the basic point you are looking for is that natural work group leaders have a base – they already have followers. Every workplace has groupings of friends and co-workers. Generally each work group has one or two among them who the rest of the group listens to and trusts. These people tend to attract and motivate others because they understand them, they know how to get along and they know how to communicate. Because these informal leaders already have a base of followers they could, if recruited, quite easily involve their co-workers in union activities: such as a noon time meeting or a letter writing campaign or a job action in support of a grievance or signing petitions, etc. If stewards are able to win over these natural leaders they will also win over a number of other members.

Stress that being an organizer means recruiting many members to get involved in union activities. It doesn't mean targeting only those members who are

identified as the informal work group leaders. While recruiting informal work group leaders is an achievement, it is important not to discount other members who have a willingness to take on tasks and responsibilities. Members who don't immediately demonstrate particular leadership qualities at the outset may in time, with support and experience, develop leadership and organizing skills and become highly effective and committed union activists. The important point is to keep the doors open when looking for new recruits. Someone who is motivated can learn the skills necessary to assume any position.

- **Identify Basic Recruitment Principles – 30 minutes.**

Representation:

- One of the most fundamental principles of recruitment is that of representation. It is critical to ensure that members who are targeted as potential activists for recruitment are representative of the membership. If activists/leaders do not reflect the gender, racial, ethnic makeup of the local's membership the union will not be recognized as legitimate by members of the groups who are not represented. If a local's membership is 60% female and 25% racial minority the steward body and local leadership should reflect that representation. If it doesn't the local needs to take a good look at its methods for recruiting activists.

Self Interest:

- Developing leadership starts with understanding the self-interest of potential activists. Potential activists need to know there is something they can gain out of being a local union activist.
- The stewards as the recruiter has to find out what the potential activist's self-interest is in the workplace.
 - * What are the issues that concern this potential activist?
 - * Is she concerned about a particular supervisor's treatment of workers?
 - * Is she concerned about mismanagement which impacts on her clients?
 - * Is she concerned about workload issues?
 - * Is he concerned about management's monitoring of data entry operators?
 - * Is he concerned about an unfair distribution of weekend shift work?
 - * Is he concerned about lack of promotional opportunities?
- Once the issues are known the organizer can develop a recruitment plan that focuses on the issues members care about.

- To better understand the self-interest of potential activists ask members to recall why they themselves became involved in union activity.
 - * Ask participants to take 15 minutes in their groups to share with others why they became involved in the Union. What was it that hooked them to become more actively involved than they had been?
 - * Ensure that everybody gets a chance to share their recollections in a short space of time. One member from each group will be selected to give a summary of why members in their group became involved in the Union.
 - * During report back Facilitator suggests that members often become actively involved in the Union when they feel an injustice has been done either to themselves or a co-worker.
 - * Participants may have become involved as a result of their own grievance, or because they were fed up and angry about unfair rules or discriminatory management practices. Whatever the issue was it was probably one that felt very personal to them and caused them to feel personally affected by the outcome.
- Participants own initiation to the union is an important source of knowledge to consider when discussing how a Local can recruit new activists. Knowing what hooked participants to union activity provides important information to understand what will draw others to the Union.

Recruit Potential Activists to an Activity:

- Some members may not have burning issues that they care about and that might draw them to the Union. Some members may agree to participate in an activity simply because they enjoy being around certain people who are Union activists.
- Whatever the initial hook is to get members involved it is a good idea to make sure these members are being recruited to an activity where they are involved in doing something that is useful and part of a larger effort like a letter writing session, or making placards or taking part in a phone tree.
- If a local's recruitment plan centres on inviting members to meetings it is unlikely that recruitment will be successful. Building recruitment around meetings is the least effective way of drawing people into the local.

Creating Positions for Potential Activists:

- Ask participants to recall how they reacted when they were first introduced to the Union culture and the language/jargon of union activists.
- Like themselves as new recruits, the members who they will be recruiting will have little knowledge of the Union and will be hesitant to participate. Recruits need to be provided with some introduction and background to understand why they are doing what they are doing. The steward needs to remember this and should take the time to explain to a new recruit what the issue is they will be working on and how, at the early stages, their job will fit into the overall strategy. It is also a good idea to avoid using insider jargon or terms like ERC, LEC, Region 4, Area Councils, Regional VP's, OFL, NUPGE. Not understanding these terms can easily make potential activists feel uncomfortable and excluded from the in-group.
- Developing activists does not happen automatically. Stewards need to create positions to enable new activists to begin their development. A potential activist requires a structure of some kind like a specific job, with a title, and defined tasks that are time-limited.
- A good place for new recruits to begin their initiation is to link them up to short term, time limited jobs on an active (action-oriented) committee. A committee that is action-oriented provides a comfortable and supportive space for new recruits. It can provide opportunities for members to take on different roles and responsibilities and, along with these different responsibilities, different levels of involvement. Striking a short term committee to research and prepare a particular issue for an ERC meeting may be one way of engaging a new recruit.

Comfort Level Participation:

- Breaking down projects into manageable pieces and then assigning new activists responsibility for certain pieces will work far better than giving over several tasks to someone who is not prepared or ready for the responsibility. If a task requires more time than a member can reasonably commit to, instead of missing an opportunity to pull in a potential recruit, the member could be asked to bring a friend or co-worker to join in and share the work of the task.
- Developing 'activism' in others is not a process that should be rushed. Pushing people to take on more responsibility than they are willing to take on, or pressuring them to devote more time to a task than they

initially want to will only cause them to feel resentful. If potential activists aren't enjoying their positions or if they are resentful they will get frustrated and quit and tell other members about their experiences.

- The steward needs to get members involved at whatever level they feel comfortable being involved. Stewards who devote a lot of time to Union activity have to realize that members have real lives with real demands that will make participation more difficult for some than for others.

Importance of Achieving Small Goals and Celebrating Small Victories:

- Just like it is important to break down projects into manageable tasks, it is important to break down large goals into smaller goals, ones that can be achieved in a short space of time. By setting out a series of small goals, members will get a chance to see the results of their efforts (what they and others accomplished) and feel motivated to continue their involvement.
- Achieving small goals are small victories which help to build confidence and sustain members to continue working together on a longer term workplace issue. Winning small victories also helps to build the track record of the local and ultimately win new supporters and new recruits. Celebrating even the small victories can be as simple as ordering in pizza or buying a special cake.

Nurturing and Providing Supports to New Activists:

- After successful recruitment of a new activist stewards need to make sure the recruit remains motivated and interested in being an activist.

Review ACETATE 'Keeping Activists Motivated'.

**MODULE 4
ACETATE**

KEEPING ACTIVISTS MOTIVATED

TO STAY MOTIVATED NEW ACTIVISTS NEED:

A sense that they are an important part of what is going on and they feel included in the group.

- Ask new activists for their ideas and opinions.
- Develop opportunities where they feel they are part of a working team.

A sense that they have some control and influence in decision making.

- Allow new activists to have some control over the work they are doing.
- Show interest and provide support but don't overly supervise or insist they do things a particular way.

A sense that the work they are doing is recognized and appreciated.

- Publicly acknowledge and recognize a new activist's initiative and efforts.
- Thank people and show appreciation.

Recruitment – Local 809 Case Study – 20 minutes

Refer participants to Case Study 'Recruitment in Local 809', Document #10 in Workbook and review instructions.

During report back Facilitator will ask each group, in turn, to answer one of the questions from those listed under Unit A's recruitment efforts and one of the questions from those listed under Unit B's recruitment efforts.

During report back you are looking for the following responses:

Unit A

- a) **Why did Unit A Stewards have such success recruiting people to the Organizing Committee? What are some important recruitment principles Stewards followed during their planning meeting?**

They did a lot of advance planning and preparation and because of this they had a clear idea of how they would appeal to the members they were trying to recruit. Because they were so well prepared, (even practicing one-on-one) they most likely conveyed confidence during the recruitment contact and gained members trust.

Stewards established criteria for recruitment. Using this criteria they targeted members with leadership qualities; members from different work areas; members with different job titles; members who reflected the makeup of the work group in terms of gender, race, etc.

Stewards also considered those issues that might be important to potential recruits, i.e. (training and developmental opportunities, flex time, stronger language on sexual harassment) and then adapted their approach to appeal to the interests of these members.

- b) **What caused the new recruits to lose interest so quickly?**

New recruits arrived at the meeting only to discover there was no overall plan or strategy developed to prepare for upcoming contract negotiations. They gave up an evening for a meeting that took over two hours with no real objective. The stewards who were the leaders of this new committee were vague and unclear what they wanted from the Organizing Committee. The Committee members had no specific role carved out for them nor were they assigned any useful task. As a result they probably left the meeting thinking they weren't really needed.

- c) **What did these Stewards need to do to maintain Committee members interest?**

They needed to recruit these members to an activity, a specific time limited task or job. They needed to have mapped out an overall, general plan of how they were going to go about preparing members for upcoming negotiations. They needed to create positions or roles for the organizing committee members that would fit in to the overall strategy.

Unit B:

1. What was significantly different about what Unit B Stewards did from Unit A once they recruited people to the Organizing Committee?

Unit B stewards recruited members to an activity. Instead of inviting people to a meeting that was poorly planned with no agenda Unit B Stewards recruited Organizing Committee members to a working meeting where they collectively designed a survey questionnaire. The survey was seen as an essential part of preparing for negotiations. Committee members left the meeting all understanding they had specific tasks with specific timeframes.

2. What important thing was missed at Unit B's second meeting that was needed to motivate Committee members to stay involved?

Everyone of the Organizing Committee members took part in some aspect of the survey. Yet not one of them received any recognition or appreciation for their time and effort.

3. How did the Chairpersons leadership style affect the Organizing Committee group?

Organizing Committee members felt controlled by this leader; they felt less involved in decision making; they were less willing to volunteer to do tasks. Their sense of fun and their enthusiasm diminished from the week before.

Mentoring, A Natural Process of Leadership Development – 10 minutes

Just like recruiting, developing and keeping new activists motivated requires advance planning. Creating a systematic leadership development plan is the only way to make it happen because it won't happen automatically. It doesn't have to be a complicated plan, it can be quite simple.

Stewards are the naturals to provide leadership development to new recruits in their immediate work area. Stewards from each unit can be assigned the responsibility to provide ongoing support, advice, and recognition to new activists in their immediate work area. As new activists move beyond the

initiation phase, take on more responsibility and become more experienced, the nature of the support they will need from the steward will change. Over time, they may themselves become stewards and the relationship will evolve into one where both stewards seek support from each other. An active local leadership development program sees stewards acting as mentors to developing activists.

Mentoring is often seen as the most natural and comfortable process of developing new local activists. When defining what the mentoring process is, it is useful to draw upon the social work concepts of task leadership and maintenance leadership (sometimes call emotional), or for our purposes union building leadership. Task leadership describes a kind of leadership that focuses on tasks and gets 'tasks' accomplished. Maintenance (emotional) leadership is the kind that cares about the emotional strength/maintenance of a new activist or activists involved in the local.

The concepts of task and maintenance leadership are important concepts to draw upon when assessing how well or how poorly a group functions under a particular kind of leadership. The concepts are also useful for examining the steward's role as a recruiter and leader of new local activists.

Facilitator should use the following examples when distinguishing between activities that correspond to the two kinds of leadership functions.

Note on the Flip Chart:

Some typical Task Leadership activities include:

- handling a grievance;
- negotiating contracts;
- preparing a meeting agenda;
- developing workplans;
- suggesting ways to accomplish specific objectives;
- moving the group to action or decision making;
- recording information;
- opening and closing meetings.

Some typical Maintenance or Union Building activities include:

- keeping members informed;
- showing an interest in members;
- actively listening to members' ideas;
- including everyone in discussion;
- encouraging quieter members to speak;
- educating members;
- recruiting volunteers;
- developing opportunities for member participation;
- thanking members for their work, their contribution;

- giving positive feedback to members.

Task activities and union building activities needn't be thought of as always separate from one another. For instance, a steward may be the best or most articulate spokesperson on the ERC Committee but may decide to let a new activist present a particular issue because providing opportunities to develop confidence among new activists is important to build and strengthen the local. Strengthening the local by developing leadership becomes an important consideration in every choice and decision the steward makes.

Leadership Style Questionnaire – 20 minutes

Facilitator suggests that participants might have some questions about their own leadership style, specifically whether they tend to have more task leadership skills as opposed to maintenance skills.

Refer class to 'Leadership Style Questionnaire', Document #11 in their Workbook. Introduce the questionnaire as an aid to help participants identify if there are specific ways they provide leadership that they would like to modify in their leadership development role with new activists. Remind participants that most leaders fall somewhere between the two extremes.

Review scoring system as outlined on the Questionnaire.

Report Back:

During report back ask participants:

- What positive things did they see about their leadership style?
- Is their style one they think will draw new activists to union activity?
- If the questionnaire helped them to identify areas they would like to work on to develop improved leadership skills.

Suggest that some participants may be interested in giving the questionnaire to other Stewards in their locals to have determine what they think of participant's leadership skills.

- **Group Case Studies – 30 minutes**
- **Report Back – 15 minutes**

Divide class into three different groups and refer groups to Case Studies in their Workbooks, Document #12, #13, #14. Ask each group to select a member to record group responses and report back their group's analysis of their case study and their responses to the case study questions. Prior to each group's reporting to plenary, participants will need to be given a few minutes to read and become familiar with the situations described in each of the case studies.

During report back the Facilitator will be looking for groups to outline their approach to find and recruit new activists. See below for possible approaches. Following each group's report encourage other participants to offer other ideas for possible recruitment approaches. Reference Handouts of Case Studies.

CASE STUDY #1

Possible approaches:

Determine the range of activities that will need to be accomplished if this issue is to be effectively pursued by the local:

- 1) Set up meetings with the 4 units' members to discuss their concerns. Use Millie and Frank to arrange the meetings. Perhaps prepare an information letter for them to distribute to the members.
- 2) At these meetings with all units' members, draw up a list of specific activities to be done, e.g. draw up and obtain signatures on a petition, have unit members choose from their units who they would like to have attend the ERC, designate who from the units will handle communication between LEC and the work groups on this issue. Designate one or two people on the LEC to contact members who didn't attend the meeting.
- 3) Tom will continue to maintain contact with Millie, as Pamela will with Frank. They'll invite them to come to the LEC and to report on what's happening with the members in their units. If other members willing to take an active role emerge at the LEC's meeting with the units, they can also be followed up with personal contact by LEC members and invited to attend LEC meetings.

CASE STUDY #2

Possible Approaches:

- 1) Contact Staff Rep who was involved in the organizing drive to find out who the active members were in the organizing drive, i.e. who appeared to be the natural leaders. The former Unit Steward should also be contacted to provide her assessment of who the potential leaders are.
- 2) The people, who had been active in the organizing drive, should be contacted by a designated LEC member. The LEC should let them know that their work in the organizing drive was considered important and they obviously must have the trust of their co-workers.
- 3) During the LEC meeting with the activist members, the LEC needs to describe the role the LEC and Staff Rep can play in assisting their members around the present issue. The LEC also needs to describe the specific role these activist members will need to play if the Unit's members' issues are to be effectively addressed by the local. Some of the activities these members will be asked to participate in are: providing needed background information, handling frequent and clear communications between the LEC and all the Units' members (this will require attention to the differing office hours of unit members), attending meetings with management. It might be a good idea to enlist the identified activists to plan and organize a meeting of all members in the new Unit. It would be ideal for these activist members to agree to become stewards. However, if they are unwilling to make this commitment at this stage, it is important that they be recruited for specific activities. If their work with the LEC and their own Unit members is successful, in all likelihood they will eventually agree to stand for election as unit stewards.

CASE STUDY #3

Possible Approaches:

- 1) The LEC cannot rely on the vague assessment of the membership provided by the one unit steward. The LEC will need to obtain more information about the history of workers' complaints in this institution and how their issues were dealt with by the Union.
- 2) Former Staff Rep who was involved in dealing with members' grievances should be contacted to find out who the active members were who challenged the discipline the year before, and who among them appeared to be the natural leaders. The other Unit Steward should also be

contacted to obtain his assessment of who the potential leaders are in the institution.

- 3) One or two people from the LEC should set up informal meetings with the members who were identified as leaders during the discipline challenge. Find out what the problem was that gave rise to the discipline. Find out whether it was resolved to their satisfaction. Discuss their assessment of current concerns in the institution.
- 4) Use these informal leaders to arrange get-togethers with a designated LEC member and workers from different departments. Plan these get-togethers to accommodate members working on shifts. Prepare an invitation flyer to welcome workers to the local. State the purpose of the get-together is to hear any concerns they have and discuss ways they can deal with their concerns. Another reason is to provide members with a brief history of the local, who the members are, and what the local track record is.

During these get-togethers:

- a) Have members identify key problems at their workplace. Draw up a list of specific things that need to be done to deal with these problems. e.g. designate who from the different departments and shifts will handle communication between LEC and the work groups on resolving problems identified.
- b) Have members suggest who from their work groups they would like to be the designated communicators. Invite these people, if they agree to be the designees, to the next LEC meeting.
- c) Identify one or two local officers who will be the personal follow-up contacts from the local executive.
- d) Present the ERC structure as an important vehicle for resolving workplace issues. Advise workers that it is their right to have this Committee structure.
- e) Schedule next informal get-together with Departments for the purposes of: electing representatives to the Union ERC Committee, and determining important working conditions issues for demand setting meeting.
- f) Invite leaders from other units in the Local to attend the next scheduled get-togethers with workers from Unit 4. Invite these leaders to describe: how they themselves became leaders; their role and jurisdiction as stewards in their units: i.e. elected stewards represent a maximum of 10 members from their immediate work area; their leadership development

process in the local; the resources and supports the union provides to stewards, the estimated time commitment involved in being active in their local; and their record of success at resolving their workplace issues etc.

Following presentations from these unit leaders describe the leadership development program that the local has in place: ask workers if they are prepared at this stage to elect members to represent them on their Unit ERC Committee; describe how issues go forward to the ERC Committee.

If workers are prepared to nominate and elect people to represent them on the Union ERC Committee invite workers to sign membership cards to be eligible to nominate and elect stewards from their work area, and from this group elect representatives for the ERC Committee. Draw up a list of issues that are most important to workers. This list will form the basis for either agenda items for the first ERC Committee meeting and/or issues that will go forward to demand setting.