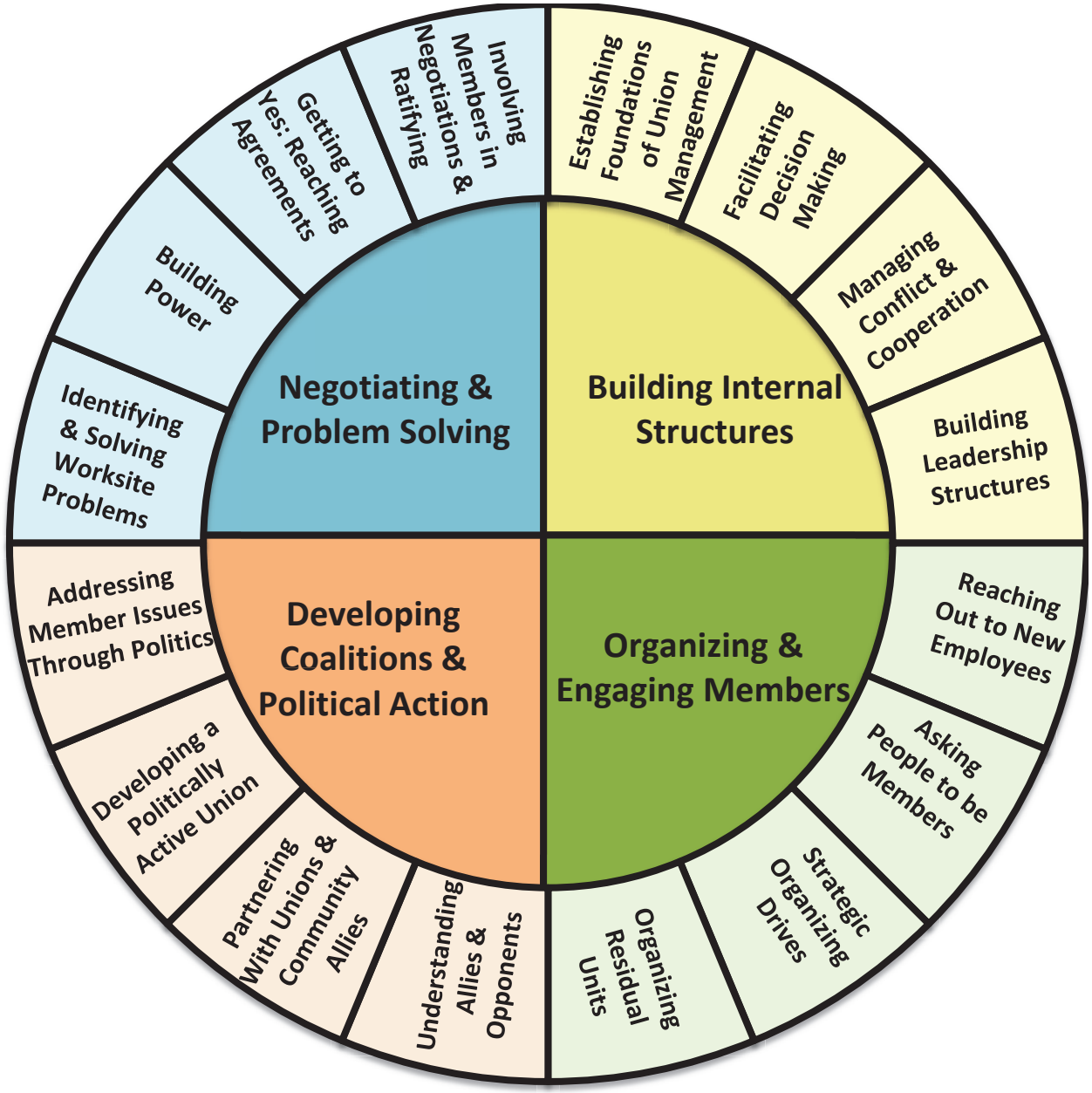
Union Power Wheel - Essential Union Capacities (Expanded)



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What Do We Mean by Essential Union Capacities?

If unions are strong in each of these essential capacities, they are in position to survive and thrive. The categories can be thought of as “spokes” of the Union Power Wheel. Just like with a bicycle, a weak or missing spoke leads to a bumpy ride. Multiple missing spokes make the wheel extremely vulnerable to any external challenges.

- *Building Internal Structures*: The skeleton and nervous system of the union, made up of committees, communication systems, leadership and decision-making norms, etc.

- *Organizing & Engaging Members:* Without an active and dues-paying membership, unions die (more quickly in the open shop). We must constantly reach out to new employees and run campaigns engaging the entire unit to remain healthy.

- *Developing Coalitions & Political Action:* Our members live and work in a broader world, and one of the ways we make things better as unions is working together with allies to improve our communities and make our political systems more fair and equitable. This takes education, volunteers, and money.

- *Negotiating & Problem-Solving:* The bargaining table is only the most obvious example of this essential activity. The core reasons unions exist is to build power to confront problems that are too big for us as individuals. This happens through collective bargaining, but also many other types of campaigns--from policy changes at the municipal or state level to informal negotiations with building-level supervisors about how to deal with unexpected challenges.

Using the Evaluation Tool

Essential Union Capacities: Each overarching capacity is divided into components. Each strand has three columns with checklists of descriptive qualities, reflecting increasing power from left to right.

1. Read through each strand from left to right and check off the qualities that are currently true for your union *from your perspective*. (If an item catches your eye that would be good to work toward, circle it)
2. After completing all strands, look at the overall pattern and assign an overall rating for the page by placing a mark somewhere within the bottom "Feels like" scale.
3. After completing each page, place a star next to any area where you would like to focus your union's growth.

Building Internal Structures

Building Leadership Structures	❑ At least one active leader in every worksite willing to send emails or pass out flyers ❑ The most important committees and/or interest groups are active and functioning	❑ Worksite leadership teams with 1:25 ratio who have 1-on-1 conversations with most of the bargaining unit at least once a year ❑ Core leadership team is representative of the membership and coordinates action across groups ❑ Committee structure evolves based on needs of members and the union	❑ Worksite leadership teams with 1:10 ratio regularly talking with entire unit ❑ Leaders fully reflect membership diversity ❑ Committees are empowered to initiate appropriate action with the union
Establishing Foundations of Union Management	❑ Local regularly procures full unit list with salaries from employer to update database ❑ Treasurer and/or president have relatively firm grasp of the union's financial situation ❑ Yearly budget and financial review are completed and approved by officers ❑ Financial safety (2 signers on all checks, records and documents kept secure, no petty cash or credit card) ❑ Compliance (IRS, MERC, AFT requirements)	❑ Local reconciles every dues pull with membership lists to make sure correct amount was collected and resolves any issues before the next pull ❑ Clearly communicated and enforced policies for dues collection and membership ❑ Worksite leaders have easy access to list of non-payers and others to follow up with ❑ Budget informed by strategic plan and approved by members ❑ Bank statements reconciled by non-check-signer ❑ Regular budget-to-actual reports presented to board ❑ All membership information managed in a single database accessible to relevant leaders and staff	❑ Local regularly produces a report of individuals in the unit including what they owe, how much they've paid, payment method, etc. ❑ Every leader has a dear understanding of how the dues collection system works ❑ Multi-year budget developed to support core goals ❑ Financial review committee suggestions for improved processes are generally implemented ❑ Leaders regularly use data to assess the strength of the union and make decisions
Facilitating Good Decision Making	❑ Constitution exists, but is out of date in some key areas ❑ Use a consistent decision method (often simple majority)	❑ Committees coordinate work effectively within larger union structure ❑ Constitution functional but not updated recently ❑ Use different decision-making methods as appropriate ❑ Core leaders trained as facilitators who apply a consistent set of norms to meetings	❑ Full membership engaged in all major decisions & able to maintain unity through conflict ❑ Constitution updated regularly ❑ New leaders regularly trained in facilitation skills & norms ❑ Union could make good decisions even if several core leaders were absent
Managing Conflict & Cooperation	❑ Activists "sort" themselves into certain committees or teams based on who they get along with ❑ Leaders usually speak up against overtly aggressive behavior in union spaces	❑ Union teams and committees are usually able to work through disagreements toward common goals without pushing people out ❑ Leaders consciously think about building functional teams by ensuring a critical mass of people who are good at facilitating cooperation ❑ Union-wide norms and discussion about interpersonal behaviors and conflict management styles	❑ Most teams regularly engage in proactive conversations around shared values, relationship-building and conflict management styles ❑ Creatively creating "conflict" by building teams with different viewpoints and the charge to find innovative proposals
Feels Like	**A core group holding things together**	**A room full of voices moving toward unity**	**A flock of butterflies flying together, splitting off and forming again even stronger**

Organizing & Engaging Members

Reaching Out to New Employees	❑ All new hires are contacted in writing and asked to become members ❑ Sometimes track and follow-up with membership asks ❑ New member packets exist, but we should probably update them	❑ All new hires are asked to join the union with an in-person conversation within first month of employment ❑ 1-on-1 conversation with all new members documented within the first semester of employment ❑ New member packets explain opportunities to get involved with the union	❑ All new hires are asked to join the union with an in-person conversation within first week of employment ❑ 1-on-1 conversation with with all new members within the first month of employment asking them to get involved ❑ "Welcoming ceremony" for every new member that joins the union
Asking People to be Active Members	❑ Every unit member has been asked to join the union at least once ❑ Members are invited to union events at least every few months ❑ Database includes at least 50% of personal contact information for members	❑ All non-members have been asked to join the union at least twice ❑ Members are invited to participate in union events at least every 2 months ❑ Almost all members are personally asked to do something with their union every 5-6 months ❑ At least 70% of personal contact information for members	❑ Worksite leaders track 1-on-1 conversations with all unit members in their turf over time ❑ All non-members are personally asked (again) to join the union every 3-4 months ❑ All members are personally asked to do something with their union every 1-2 months ❑ At least 90% of personal contact information in database
Running Strategic Organizing Drives	❑ Membership asks and issue drives happen, but are often disconnected and have vague objectives & timelines ❑ In bargaining years, distribute a survey to determine member issues for negotiations	❑ Local engages in campaigns as crises arise, but is not organizing to identify issues to proactively take on ❑ Membership drives have S.M.A.R.T. goals, strict timelines, and indude a member survey/story collection ❑ All campaigns (contract, political, issue-based) incorporate a membership ask of non-members	❑ Local is always engaged in a campaign that directly relates to the union vision ❑ Worksite leaders have the capacity to identify organizing issues and initiate worksite-level campaigns
Organizing Residual Units	❑ ID groups who are excluded from our current CBA language ❑ ID any other groups of non-represented workers at the same employer ❑ Research unit sizes and develop reports for individuals who are in various positions	❑ Ask non-represented workers who else they know that might be interested in working together ❑ Propose language to bring excluded groups into union ❑ Identify leaders and develop an Organizing Committee of non-represented workers ❑ Local officially votes to welcome other individuals into their locals	❑ Bargain neutrality and card check agreement with the employer ❑ Prioritize union growth/inclusion of unrepresented workers in bargaining platform
Feels Like	**The union is a resource**	**Solid, visible, and welcoming**	**Confident, nurturing, and proud to ask people to be part of our union**

Developing Coalitions & Political Action

Engaging Members Around Politics	❑ All worksite leaders distribute flyers and encourage members to vote for endorsed candidates ❑ Occasional local events addressing current affairs, labor history, or other relevant topics ❑ 10% of members volunteered at least once last year (talking to voters or legislators) ❑ All members are asked by email or flyer to volunteer for shifts	❑ Regular, topic-based membership discussions of relevant issues (e.g. union connection to social justice movements, how politics works, AFT/AFL-CIO structure) ❑ Some worksite leaders engage members in big-picture conversations ❑ 25% of members volunteered at least once last year (talking to voters or legislators) ❑ Some members willing to volunteer in high-need areas outside their comfort zone ❑ All members asked to volunteer through 1-on-1 conversation	❑ Most members engage friends & family to explain attacks on unions and public education & our plan to fight back ❑ All worksite leaders have a plan for site-based education ❑ Working with coalitions to educate the community about relevant issues ❑ 50% of members volunteered at least once last year (talking to voters or legislators) ❑ Database tracks volunteer preferences to target the best individuals for the job
Improving our Schools and Communities Through Political Action	❑ Sometimes raise non-contract issues with admin, but they usually get dropped ❑ Raise concerns at board meetings ❑ Local participates in the endorsement of employer's governing board candidates	❑ Regularly push admin to address "popular" issues (e.g. class size) even when they say it's a prohibited subject ❑ Sometimes engage "friendly" board members 1-on-1 to ask for support during negotiations ❑ Local political & community leaders speak out in support of the union ❑ Actively support endorsed candidates for employer's governing board	❑ Confidently and proactively engaging administration around non-contractual issues ❑ Engaging broad groups of members and community stakeholders in problem-solving ❑ Respectful working relationships with all board members developed through regular 1-on-1 meetings ❑ Local recruits and develops individuals to run for employer's governing board
Understanding Allies & Opponents	❑ Basic power mapping to determine who are the real decision-makers of the employer ❑ Initial outreach to potential community allies	❑ Power map includes community leaders and groups that can influence decision-makers ❑ Developing an understanding of the goals of allies and have a plan to support their efforts	❑ Up-to-date power map of the local community showing relative power and attitude toward the union ❑ Working with allies to achieve mutual goals ❑ Long-term goal to reshape power map by neutralizing opponents and strengthening allies
Partnering With Unions & Community Allies	❑ Pay per caps to local AFL-CIO labor council ❑ Occasionally participate in ad hoc community coalitions around issues	❑ Delegates regularly participate in local AFL-CIO labor council ❑ Participate in coalition with other unions at the same employer ❑ "Permanent" community coalition with core partners (e.g. K-12: parents; Higher Ed: students)	❑ Proactive work to ensure a pro-education majority on employer governing board ❑ Running multi-year issue campaigns with core partners to win better policy at the institution or surrounding municipality
Feels Like	**We understand the political context enough to worry about losing what we have**	**Most of our members" get it" and are engaged and active**	**Our union is a leader of the local progressive movement and our members are empowered to act independently**

Negotiating & Problem Solving

Identifying & Solving Worksite Level Problems	❑ Worksite leaders pass problems on to an officer but are not proactively looking for issues ❑ President or grievance chair does most of the worksite problem-solving	❑ Team of members at each worksite able to effectively administer the contract and handle basic problems ❑ Worksite leaders proactively handle basic conflict resolution & most members understand contract basics	❑ Worksite leadership teams represent all constituencies and resolve most problems at the worksite level ❑ Proactively engaging members to find & address issues early ❑ Creatively "stretch" the contract to address important issues (via joint committees, MOUs, etc.)
Building Power to Improve Negotiations	❑ Develop issues via survey of some members and grievance committee identifying patterns ❑ Administration usually sets the timeline for negotiations ❑ Pressure tactics utilized but often feel disconnected from the negotiations process	❑ Local creates campaign committee separate from bargaining team or E-Board ❑ Strategic coordination between relevant committees to create plans and adapt ❑ Systematic surveys get responses from 80% of members ❑ Union establishes its own timeline for admin to respond ❑ Escalating tactics based on understanding of power and leverage within admin	❑ Build unity by running campaigns even when you think you can win without one ❑ Issues identified via regular 1-on-1 conversations with members ❑ Often run multiple campaigns, balancing the energy devoted to each
Getting to Yes: Reaching Agreements	❑ Define and communicate the core values and principles our proposals are rooted in as a team ❑ Proposals and agreements are almost always put in writing to ensure clarity	❑ Core priorities and values are clearly communicated to members and the administration ❑ Use sidebars and "back channel" communication to figure out the other side's interests as clearly as possible ❑ Willing to try working within the other side's framework if it doesn't conflict with our values ❑ Set timelines at the table in alignment with escalating tactics outside	❑ Often able to propose "third way" alternatives that can fulfill our core priorities and get to agreement ❑ Members most affected by particular proposals are involved in decision-making about the agreement ❑ Creatively use external pressure to move the parties toward agreement
Involving Members in Negotiations & Ratification	❑ Bargaining survey of members ❑ TA is summarized for members to read before vote ❑ Bargaining team presents unified front in support of platform & TA, but other leaders sometimes publicly disagree ❑ Execute constitutional decision-making process as written	❑ Members able to give input on bargaining positions at meetings during the process ❑ Members are personally invited to vote to maximize turnout ❑ Full leadership team maintains united front; nobody speaks against TA ❑ Clear process communicated to members well in advance (including adaptations to constitutional process)	❑ Members vote on strategic direction multiple times over the course of negotiations ❑ 2-way communication from start to finish of negotiations means no surprises or confusion at ratification ❑ Full leadership team actively organizes to achieve a super-majority "yes" vote ❑ Members presented with a clear choice at final meeting: "Voting no for this TA means you are willing to do X to help get a better deal."
Feels Like	**Cautious, but basically effective**	**Members" own the contract and feel engaged in the process**	**We drive the negotiation process, not only during contract years, but also during the life of the agreement**