

# CAMPAIGN PREPARATION

## TARGETING | SET UP | PLANNING

---

The success of internal organizing campaigns will be determined by what we do before the campaign even starts. Targeting must be strategic. Before undertaking a campaign, we must evaluate the union and its environment, at both the council and local level. Virtually every local union can benefit from internal organizing, but not every local union and certainly not every work area is ready for an internal organizing campaign. **Internal organizing targeting decisions must be based on:**

- An analysis of the union's strengths and weaknesses.
- The level of resources that can be devoted to internal organizing.
- The issues of concern to employees and the ability to change the situation.
- The willingness of leaders to accept responsibility for a campaign.

Councils and locals should evaluate and prioritize each potential target for internal organizing. The scope and size of the internal organizing target(s) should correspond to the resources available. The most important resources are the members and leaders who are willing to accept responsibility for a given internal organizing campaign.

Every target chosen for internal organizing should be evaluated against the standard of our ability to achieve real success. If an entire local union or group of locals meets the criteria for success and the resources exist to run the campaign, that's great. More often than not, we will need to choose narrow targets at first. Although there may be resistance to targeting within the local because some workers may feel left out or ignored, targeting is crucial because resources are scarce. After success is achieved in one area, move on to another.

**The AFSCME Model is based on targeting work areas where there is an existing base of membership and the existing leadership is willing to accept responsibility for the campaign.** Meeting these two criteria is critical to success. Most local unions who consider internal organizing campaigns do so because they have identified weaknesses, but starting where the union is weakest is a mistake. Each local union, no matter how small, no matter how low their membership, has relative strengths in some work areas. Internal organizing targeting must evaluate those strengths and use them to prioritize resources and concentrate efforts.

Targeting is also about understanding which factors can influence the effectiveness of the campaign, or increase the interest of employees in the union. While the employer controls some factors, many are within the union's control. The timing or scheduling of negotiations, for example, is often a critical factor in planning internal organizing drives. Building an organizing drive around a contract campaign is a natural way to focus your organizing efforts. Likewise, political election cycles, the implementation of pay increases, the threat of privatization, the threat of budget cuts and other employer actions must be evaluated for their impact on our ability to affect change.

---

**Part of the preparation for any campaign is to collect information on the target.** The most critical information in any organizing campaign is the list of workers in your target (with home addresses and phone numbers where possible). Employee lists often can be obtained directly from the employer. If address and phone information for non-members cannot be obtained from the employer, one of the first tasks is to get that information from a large majority of people in the targeted group. The AFSCME model recommends getting a minimum of 80 percent of the addresses before proceeding with a campaign.

## COLLECTING THE NECESSARY INFORMATION

---

Building address lists can be done by using the phone book, calling information, using Internet white page services, using commercial data matching services, checking voter registration files, talking to co-workers, collecting informal lists that are available in the worksite (work schedules, time sheets, payroll records, holiday card lists, personal address books), using sign-in sheets at meetings and circulating petitions. **Spending the necessary time to build a good list is critical.**

Several Internet sites can be used to improve your address and phone information, including:

<http://www.yahoo.com>  
<http://www.anywho.com>  
<http://www.infospace.com>  
<http://www.pc411.com>  
<http://www.reversephonedirectory.com>

---

*Internal organizing isn't just about organizing members  
—it's about organizing and out-organizing the boss.*

---

It is also important to research the employer. We must be willing to look beyond the everyday relationship, and find out what pressure points can be used to win battles in the workplace.

Who holds the power and how can they be pressured? We must understand what factors affect the boss' ability to meet our demands. What budget problems exist? What political, ideological or economic interests will cause the employer to resist union actions? How will the boss and the workers react to external pressure? What are the political and community groups that can be used to pressure the employer? How can the press and public opinion be used? Internal organizing isn't just about organizing members — it's about organizing and out-organizing the boss.

---

# CAMPAIGN PREPARATION

## PRE-CAMPAIGN PLANNING MEETINGS

---

**A good campaign requires a solid plan based on strategic assumptions shared by campaign leaders.** Along with staff, key council and local leaders should set up a meeting to discuss the plan. While local, council and International Union leadership may agree on the need for internal organizing, everyone starts with their own set of assumptions, abilities and past practices. The first step is to review the Internal Organizing Model and discuss how it applies to the local. The ultimate goal of the meeting is to develop a plan for targeting, recruitment of the organizing committee (Member Action Team), commitment of resources and preparation. In doing so, participants should answer the following questions:

- 1. Can the target be refined to work area(s) with a sufficient membership base and core group of leadership?*
- 2. Are there substantive workplace issues that can be affected by the union?*
- 3. How can we develop accurate and complete lists?*
- 4. Does the local union have credibility with workers? What can be done to strengthen the local's credibility?*
- 5. Who are the respected workplace leaders to be recruited for the Member Action Team (MAT)?*
- 6. What resources can the council and local commit?*
- 7. How will employee contacts be tracked and records be maintained?*
- 8. Are the leaders willing to commit to a program of one-on-one communications including house calls?*

The objective of the planning meeting should be to produce a draft of the campaign plan with a time line and concrete benchmarks. The plan should serve as a guideline for the campaign and the benchmarks should be objective standards that determine our readiness to move ahead with the subsequent phases of the campaign. For example, we should set a specific numeric goal for the MAT in the pre-campaign phase. The goal should serve as the benchmark for whether we are ready to begin a wider house-call program and prepare for initial membership actions. We should also set benchmarks for turnout in membership actions so we can measure our readiness to escalate to more significant actions.

It is impossible to foresee all the needs, obstacles and events in the campaign. **We should regularly review the plan, question the original assumptions and revise the plan when necessary.** The issues identified early on may not turn out to be the issues that people care about the most. The boss may react differently than you expect. The lists may not have accurate information. Finally, the original benchmarks may need to be changed.

## DEDICATING THE RESOURCES

---

**Local unions must be willing to treat internal organizing as a priority.** That means dedicating the time, effort and money needed to make it work. The most important resources are the time and effort of staff and leaders.

Local unions should also be willing to invest financial resources in the things that make a difference in the ability to organize. The local's willingness to dedicate resources also has to be matched by a commitment to spend those resources wisely. First and foremost, resources should be spent to enhance lists, facilitate house calls, support worker actions and conduct employee orientations. Experience tells us that it is easy to spend money on things that have no relationship to success. For example, expenditures on written materials are only helpful if the campaign is built on one-on-one communications. Spending money for a newsletter that does not support the campaign message and contribute to one-on-one communications is a questionable use of organizing resources. Similarly, a local holiday party may be a nice opportunity to socialize, but it makes little sense to spend scarce organizing funds for parties or general meetings that are not directly tied to actions around important workplace issues. Locals should also avoid the temptation to provide signing bonuses to increase membership. While we often hear stories about the effectiveness of such incentives, they lose their effectiveness rapidly and do nothing to build strength in the local.

---

*The most important resources are the time  
and effort of staff and leaders.*

---

