

on the road to a

UNION ORGANISING STRATEGY

EPSU RECRUITMENT AND ORGANISING TEAM

EPSU has been working closely with many of its affiliates in Central and Eastern Europe as they debate and draft strategies to strengthen their recruitment and organising efforts.

Dr. Greg Thomson, former head of strategic organising at UK public service union UNISON has been providing advice and support and looks at the progress made so far.



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Over 50 trade unions have taken part in workshops and consultations on recruitment and organising (R&O) run by EPSU's organising team, with the support of the European Trade Union Institute. The aim has been to discuss the whys and hows of drafting a strategy, working through the process with each affiliate.

It was important to ensure that each trade union recognised the challenges and opportunities facing them and could develop solutions appropriate to their needs and circumstances. It wasn't about shoehorning their organising approach into an off-the-shelf model.

Ideally unions should be looking to systemic changes in the way they operate, so that organising is embedded in everything they do. Campaigning and negotiating should be viewed through the prism of organising. This is a long-term process and not something that can be achieved overnight. At every step of the way, affiliates need to adjust the strategy, as it becomes clear what works and what doesn't. Learning by doing is key.

The initial feedback from affiliates who have been through this process has been encouraging and has revealed some of the challenges that they have faced in developing effective strategies as well as some positive outcomes so far that are explored below.



Dr. Greg Thomson

What is organising?

The starting point of EPSU's discussion with affiliates was to look at two vital and complementary elements to organising:

- **Recruitment and retention of members** – aiming to increase trade union density in the workplace and by doing so the strength of the union. Workers are more likely to join a strong trade union, which they see as better able to protect their interests. Consequently, success in recruiting new members can lead to even more workers joining.
- **Developing an engaged and active membership** – an essential pre-requisite to mobilising members in support of union demands and again a key element in attracting new members.

While all affiliates understood the benefits of increasing membership the link with increased activism among members was sometimes less obvious. However, membership engagement and activism are critically important for long-term recruitment and retention of new members. They are also essential for mobilising members in support of union campaigns.

Activating members

Getting members active has been a challenge during the pandemic when face-to-face conversations are limited but some unions have exploited digital tools to keep members informed and engaged. The Publisind federation in Romania has been working across all forms of media, increasing the number of posts, messages and articles on social media, the web as well as on TV and in the press. The central aim has been to listen to members and to publicise the challenges and problems that they face at the workplace. Alongside keeping members up-to-date and active, Publisind has developed digital tools for recruitment, such as simple online membership forms.

The need for a strategy

If a union is going to organise members and the wider workforce, it needs a strategy, endorsed by the whole union, setting out how it is going to get workers to join and members to become engaged and active.

The three interrelated elements that are essential for a sound foundation for organising are:

- a written strategy document;
- information about current and potential membership in a database, and
- buy-in from the wider union.

Effective implementation of the strategy will need the support of the whole union. This in turn depends upon the wider membership believing that the strategy is based on sound evidence about current and potential membership.

A written strategy

This is the foundation of any organising strategy and should set out clearly an evidence-based approach to organising. Who is the union intending to organise and why? Any organising activity should have a time frame and identify what resources will be used to achieve the organising objectives.

The added value of a written strategy is that it provides a marker against which progress can be measured. This

The SDE energy union in Slovenia has drawn up a detailed organising strategy that includes essential data on existing and potential membership. It also outlines important factors affecting employment trends and likely future developments in the electricity sector. Meanwhile, the BDDSZ child-care workers' union in Hungary has been using a variety of tools for mapping membership and potential membership. These include freely available and simple things such as google maps and excel sheets that have helped the union get a full national picture of its membership and then set strategic goals to recruit and organise.

means that it should contain specific targets both in terms of an increase in membership and activism, against a specific timetable. Progress should be constantly monitored to see what works and what doesn't work, and the strategy should be adjusted accordingly.

A membership database

The single most important tool for organising is a record of existing members and activists. Ideally this information should be held on a centralised database that can be easily interrogated to locate and categorise members. If the database is properly maintained with contact details it can be an invaluable communications hub, making it easy to send texts and emails either to the whole membership or to specific groups, targeting, for instance, women or young members.

If the database contains employment as well as membership data then it can be used to show union density – the proportion of workers by workplace or sector that are members of the union. This is a measure of the union's strength and a pointer to where there is the greatest opportunity for growth. Affiliates with a central register saw it as an easy and immediate way of monitoring changes in membership in different workplaces. This allows the union to share good practice and intervene to assist where membership numbers are under pressure.

Several affiliates are focused on introducing or improving national membership databases as an essential element of their recruitment and organising planning. These include the OSZSP CR health union in the Czech Republic, Publisind in Romania) and two unions from Croatia – the SOMK education, media and culture union and the SDSLN public administration union.

Without this centralised data, many affiliates base their organising strategy on a broad-brush analysis of the membership. This makes it more difficult to be precise in targeting potential members and allow the union to concentrate its resources as effectively as possible.

Some affiliates face technical and practical problems achieving this with local branches sometimes reluctant to see the membership

data centralised. The challenge is to have the debate with local organisations and make the case not only that a central database will not diminish local power but that without it the whole union's strength will be undermined.

Whole union buy-in

In discussions with affiliates it was apparent that a clear and concise strategy document was important for discussions and agreement at all levels of the union. This is a crucial step in getting buy-in by members and achieving a whole-union approach to organising as an essential element of trade union work and not an add-on.

Affiliates also recognised the benefit of making organising a key part of their education programme. Not just talking about how to organise, but also showing how it could be made integral to other aspects of trade union work such as campaigning and bargaining.

Trade unions are operating in a volatile environment where constant threats to members' jobs and living standards demands different responses. Whether these are political or industrial, or a combination, they have to have organising as an integral part and not an optional add-on. This works when activists and members see the importance of organising to union strength, and what it can deliver.

One example of this was a campaign in a London university to get

The Sanitas health federation in Romania agreed several resolutions at its 2021 Congress to get the political support for its organising strategy. Commitment to its implementation is crucial as the first part of the strategy is to put in place a functional digital membership database, and to achieve this goal, the whole union will have to cooperate and supply information.

The GSZSZ health and social services union in Serbia has taken up a number of proposals from EPSU and included them in a resolution agreed at its 2021 Congress. The union will focus on implementing a new and updated database, but also on new educational initiatives that will help and support its organising efforts.

better pay for low paid cleaners, most of whom needed two or three jobs, just to earn enough to feed their families. The cleaning work was contact-ed out and the workers felt isolated. Despite a vigorous campaign by the national union, little progress was made, with the university and contrac-tor each saying the pay rates were not their responsibility.

Things only changed when the union talked to other workers in the uni-versity about the problems faced by the cleaners. Gradually other work-ers not only became active in supporting the cleaners but started re-cruiting more members to join the campaign, which gathered force and was eventually successful. It was not enough that a few people at the national union understood the need for organising, the cleaners them-selves needed to see that their strength lay in greater numbers and that meant getting the wider university workforce involved, and indeed the wider workforce needed to see the importance of organising.

Building trust

To attract new members, the union must show workers what is in it for them. They need to trust the union to pursue the issues that are impor-tant to them and to understand that by joining the union they will make it more likely that the union will be successful. Some unions had achieved positive outcomes from specific campaigns but not necessarily made the systemic changes in the day-to-day work of the union, creating what is sometimes termed an organising union. However, it has been clear from the way affiliates have been drafting their strategies that they are begin-ning to understand the importance of this longer term more systemic approach.

The organising strategy should set out who the union will be organis-ing, based on membership information and broad agreement across the whole union. The central question that will determine the nature of the organising activity is what has the union got to offer? It may be that the union is saying it will give workers a stronger voice in the workplace, or ensure they are treated fairly, or improve their pay and conditions. What-ever the emphasis it should be based on what workers themselves are saying.

However, it is not just about running the right campaign, workers need to believe that by joining they make it more likely the campaign will succeed. In this way workers can be clear what they get for their subscriptions. Essentially, it is about belief and trust. Workers are being asked to trust that the union will deliver on its promises, and that trust can be built by showing what the union is about and through recommendation.

The following are important building blocks for the union in establishing trust among workers:

- **Dialogue** – listening to workers' and members' concerns, as well as letting them know what the union can do for them.
- **Visibility** – the union must be seen to be active in the workplace, so that workers believe that the union is there for them and that they are welcome to participate in it. This can take many forms, including distributing information on noticeboards and through leaflets, holding meetings and raising issues with local management.
- **Identify the issues** – workers want to see the union actively campaigning for things that matter to them. They should be encouraged to participate in campaigns even if it is only by completing questionnaires or signing petitions, so that they feel ownership of the campaign.
- **Advertise successes** – unions can sometimes be reluctant to promote their own success. Even when times are hard, and unions don't get all that they wanted, it is important to let workers know what the union has achieved.

The nuclear workers' trade union in Ukraine has very high union density but realised that it needed to act to ensure that younger workers continued to join up, knowing that it would be more difficult to recruit them if they didn't join in the first year of employment. The union invested time and resources into reaching out to unorganized young colleagues, getting them involved in training, cultural, leisure and other events while finding out more about their issues of concern and indicating how the union could help them.

Workers who see that the union is listening to them, relevant to them in the workplace and fighting for the things they want, will trust the union more and be more likely to join and become active. That is certainly the message from the president of the SOMK education, childcare and media union in Croatia: "We organised several public actions, including a series of protests from 2016 to 2018, in order to address the problems that childcare workers were facing. Later, I would always hear the same question from members – 'When is the next action? We are coming!'"

The union also needs to make clear that new members are welcome, spelling this out in union literature and communications and ensuring it is discussed in the workplace. Workers should be told that by joining the union, they will:

- **Get a voice**, both individually within the union's democratic structures and through the collective strength of the union with their employer.
- **Be protected**, through the collective strength of the union against unfair treatment.
- **Benefit from better pay and conditions**, because of the increased collective strength of the union.
- **Become part of a wider trade union community**, which will stand up for the rights of ordinary workers at regional, national, European and global levels.

Joining needs to be made as easy as possible and preferably online.

Good communications are crucial

Communication should be a key part of any organising strategy and there is wide recognition that face-to-face communication is best, although not always practical. Sometimes there simply are not enough existing activists to do it, or access to workers may be an issue. Affiliates are increasingly looking to electronic communication, whether through social media

or directly via email or text. During the pandemic face-to-face communication has become even more difficult. This has accelerated the move to digital communication and highlighted the importance of social media. While unions are keen to embrace these new forms of communication, it is best seen as a supplement to the face-to-face approach.

There are three points to bear in mind:

- **Maintaining social media or other digital communication is work intensive. Social media need to be relevant and up-to-date. Responsibility for communication needs to be managed and ideally several people should be actively involved in producing and updating content.**
- **Communication should always be a two-way process. Members need to see that their views are being heard and acted on. Union successes must be widely publicised, even if they appear minor.**
- **Communicating with members digitally is likely to be easier using a centralised computer-based membership system with up-to-date contact information.**

Communicating digitally with the wider workforce is more difficult. Face-to-face communication can be supplemented by leaflets and posters. It is important that members are encouraged to talk to non-members about

The Publicind federation in Romania and especially its police union, Europol, has been putting a lot of resources into increasing the visibility of the union and communicating with workers – both members and non-members. The union has a very good website, updated on regular basis, while using social media for regular communication with members and non-members.

Some unions have seen the value in creating teams of people to take on different organising responsibilities, especially communicating with members. The SSPVIOS union for education and preschool workers in Serbia has set up a team of six people including the president of the union to focus on organising and increased engagement.

the union. Experience has shown that workers are much more likely to listen to colleagues. Many workers find talking to colleagues at work about the union quite daunting, so it is important to provide them with material that they can use. Information about union successes can be particularly helpful. Equally, workplace activity such as open meetings can provide an opportunity for existing members to engage non-members.

In some workplaces, unions are able to take part in employer induction events and so can get access to new workers. This is an excellent opportunity for recruitment as survey evidence suggests workers are most likely to join the union in the first year or two of their employment.

Challenges – competition between unions

Several affiliates mentioned the presence of other unions in the areas where they recruited. This raised the strategic question of whether there was scope for merger or at least joint working. Naturally, this would all depend on local circumstances, but affiliates could see the advantage of joint working with other free and independent trade unions that were interested in advancing members interests. Unfortunately, there are some areas where there are yellow unions that are in the pockets of the employers for political or other reasons. In such cases, there is no question of joint working; instead developing membership ownership, participation, and engagement amongst the affiliate's own members becomes even more vital. This will clearly demonstrate that a free, democratic, and member focused trade union will empower workers to achieve the outcomes they want. In contrast to yellow unions, which will sacrifice member interests for the benefit of the employer or political party.

Challenges – free riding

Free-riding is a perennial problem for the vast majority of unions where workers are reluctant to join because they already benefit from the collective agreements that unions negotiate. This is a difficult argument to counter but unions need to argue that a worker saving on membership fees is a false economy. The strength of the union mainly comes from the

size of its membership. A union with only a few members can easily be dismissed by the employer as only representing the views of an insignificant minority of its workforce. But where the union has a high density of membership, the employer knows the union speaks on behalf of the majority. So, by not joining the union, free riders are actively undermining the union's negotiating strength, meaning that the collective agreement that they benefit from will be less beneficial to them than it might otherwise have been.

Non-members need to see how the union works to negotiate and campaign for improvements. This can involve open consultations on what workers want, keeping members and where possible non-members up-to-date with negotiations and outcomes, distributing material in support of claims and getting petitions signed.

Review and adapt – over the long run

Sustainable organising is not something that is achieved by a single campaign. It depends upon systemic change of the whole union. Each union needs to decide which measures will best match the challenges and opportunities it faces. These will change over time, and ideally a team of organisers should be tasked to review and adapt the strategy. No strategy is written in stone as it is the beginning of a journey, of a long-term process and EPSU will be there to provide support when and wherever it can.

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