



# **MAKING THE CASE FOR UNION MEMBERSHIP:** The Strategic Value of New Hire Orientations

A Best Practice Guide for  
Union Leaders and Staff



**PennState**

**OCTOBER 2017**

This report was originally released in September 2016 by the Jobs With Justice Education Fund and was written by Michael Wasser, former Senior Policy Analyst. This revised 2017 edition includes new research from Paul Clark, Professor and Director, Penn State School of Labor and Employment Relations.



# TABLE OF CONTENTS

|                                                                                  |           |
|----------------------------------------------------------------------------------|-----------|
| <b>Introduction</b>                                                              | <b>4</b>  |
| How to Create a High-Quality Union Orientation                                   | 4         |
| Best Practices at a Glance                                                       | 5         |
| International Unions Have a Role in Union New Hire Orientations                  | 6         |
| <b>Data Demonstrates Value of New Hire Orientations</b>                          | <b>6</b>  |
| <b>Best Practice: Orient New Hires As Early As Possible</b>                      | <b>10</b> |
| Bargain for the Right to Hold Union Orientations on Company Time                 | 10        |
| When a Union Orientation Must Be Off-Site                                        | 10        |
| When a Union's Membership Is Geographically Dispersed                            | 11        |
| <b>Best Practice: Use Intention When Selecting Facilitators</b>                  | <b>12</b> |
| <b>Best Practice: Present a Positive, Substantive Introduction to the Union</b>  | <b>13</b> |
| Prepare Ahead of Time                                                            | 13        |
| What to Say                                                                      | 13        |
| How to Say It                                                                    | 15        |
| Signing Up New Members                                                           | 15        |
| Don't Oversell                                                                   | 16        |
| Be Adaptable to Real-World Dynamics                                              | 16        |
| <b>Best Practice: Encourage New Hires to Become Active Union Members</b>         | <b>17</b> |
| <b>Best Practice: Provide Handouts and Freebies</b>                              | <b>18</b> |
| <b>Best Practice: Strive for Quality in Everything</b>                           | <b>18</b> |
| Develop Quality Materials                                                        | 18        |
| Know Your Audience                                                               | 19        |
| <b>Best Practice: Follow Up with Orientation Participants</b>                    | <b>20</b> |
| "Formalize" Informal Follow-Up                                                   | 20        |
| Encourage a Continued Relationship With the Union Orientation Facilitator        | 20        |
| Invite New Hires to Meetings, Events, or Actions                                 | 21        |
| Create Ritual to Celebrate New Hires Who Join the Union                          | 21        |
| Provide New Members With Mentors                                                 | 21        |
| <b>Best Practice: Aim to Be Systematic</b>                                       | <b>23</b> |
| Monitor the Orientation Program                                                  | 23        |
| Provide Training for Facilitators                                                | 23        |
| Engage in Continuous Improvement                                                 | 23        |
| Reward Successful Orientation Programs and Recognize High-Achieving Facilitators | 23        |
| <b>Endnotes</b>                                                                  | <b>24</b> |
| <b>Appendices</b>                                                                | <b>25</b> |
| Sample Contract Language for Union New Hire Orientations                         | 25        |
| Sample New Member Participation Forms                                            | 25        |
| Sample Post-Orientation Engagement Checklist                                     | 26        |
| <b>Acknowledgements</b>                                                          | <b>26</b> |



# INTRODUCTION

“In the union’s case, our survival relies on new hires. This kid that walks in the door two years out of high school, he’s basically the future of our labor movement.”

Casey Shelton,  
Business Manager,  
IBEW U-19 Coordinating Council

“The cost of unlearning is greater than the cost of learning.”

Dr. Paul Clark,  
Director of the Pennsylvania State University  
School of Labor and Employment Relations

New hire orientations are a strategic tool for building union power. High-quality orientations have proven to increase sign ups among new hires and bolster their commitment to the union. Committed members are more likely to stand with the union in the face of tough bargaining fights and political attacks. That means unions can devote more resources to going on offense, instead of wasting precious money and energy shoring up members for defensive fights.

This guide offers practical ways that unions can develop and enhance their orientations for new bargaining unit members. The best practices presented here are drawn from a 2017 longitudinal study of new hires, relevant social science research, an electronic survey of 49 unions, interviews with officers and staff responsible for their unions’ orientation programs, content analysis of union welcome packets, and observations of existing orientation programs.<sup>1</sup>

Union officers and staff understandably may feel that they are stretched thin, without time to focus on developing or improving an orientation program. But an effective orientation program can have a lasting and outsized impact on unions’ future strength. In that way, high-quality orientations will deliver a valuable return for unions on the modest investment required to establish, administer, or even simply upgrade their programs. Indeed, new hire orientations and follow-up are a form of organizing—the core strength of America’s unions. Be willing to transform and experiment, and the advice in this guide can help your union build a stronger, more committed membership that’s ready to take on the next big fight.

## How to Create a High-Quality Union Orientation

Research shows that commitment is strongest and most lasting in new hires who experience both formal socialization and informal socialization.<sup>2</sup> Formal socialization is a more structured and organized experience, typically occurring in a group setting. Formal socialization’s purpose is to instill in new members a sense of loyalty or commitment to the organization, to teach new members about the organization’s rules and processes, and to introduce a group’s formal expectations to new members. Informal socialization is less structured, is adaptive by nature, and is more likely to occur at the individual level. Informal socialization can be used to reinforce information presented in a formal socialization setting, and it can provide further guidance to new members about the unwritten customs, traditions, and practices that may exist.

## Best Practices at a Glance

Here is how unions can best ensure they provide new hires with the kind of formal and informal socialization that leads people to become committed members. The guide provides a fuller examination of each best practice on the pages that follow.

- **Orient new hires as early as possible:** Unions should aim to hold their orientations as close to a new hire's start date as possible, ideally by negotiating for a structured time during the employer's orientation program. Delays in orienting new hires allow others, including management, to influence new hires' views of the union. Consider digital alternatives when members are geographically dispersed.
- **Use intention when selecting facilitators:** Think strategically about orientation facilitators, paying attention to the race, gender, and age of new hires. Consciously or not, new hires will decide if they can see themselves in the union when they look at the person facilitating their formal union orientation. Long-tenured leaders or members may be the most knowledgeable about the union, but they may not be the most effective representatives of the union if they talk down to people of different ages or genders. Having an experienced leader and a younger member facilitate orientations together can help convey to new hires that the union is knowledgeable and diverse. As with the formal orientation, pay attention to race, gender, age, and even occupation of new hires when considering which union members will conduct informal outreach to new hires.
- **Present a positive, substantive introduction to the union:** The information new hires receive during the union's formal orientation session substantially impacts their views of the union. A positive first interaction with an organization creates a stronger, more positive attitude toward the organization.<sup>3</sup> Develop a presentation that is informative and convincing. Remain mindful of the real-world issues new hires face, and avoid the temptation to oversell what the union can do. The more relevant topics that are covered in the orientation, the more likely new members will perceive the orientation to be helpful.
- **The longer the orientation, the better:** The greater the length of the orientation, the more helpful it was viewed by new hires. If your local union's orientation is 15 minutes in length, increase it to 30 minutes. If you typically hold a 30-minute orientation, increase it to 60 minutes. If there is a way to make it three hours, then do so, knowing there will be a sizable return on investment from the perspective of new hires.
- **Encourage new hires to become active union members:** Introduce the union and explain how being part of it advances members' interests inside and outside the workplace. Ask new hires to join the union, and encourage participation, with a streamlined process for doing both.
- **Provide informative handouts and freebies:** New hires find informative materials and publications helpful. Presenting information in multiple ways (e.g., PowerPoint, video, handouts) also improves participant comprehension.<sup>4</sup> Free union paraphernalia (pens, badge clips, T-shirts, etc.) can build new hires' identity with the union inside and outside the workplace. Union gear also contributes to longer-term commitment and identification with the union.
- **Strive for quality:** Simply holding an orientation is not enough. The quality of the union's orientation influences commitment to the union. Professional-grade materials and an understanding of how new hires prefer to communicate can encourage sign ups and commitment to the union. However, shoddy presentations, typos in handouts, out-of-date information, and inappropriate or poor presenters can cast doubt about the union in the minds of new hires.



### Planning formal orientations

A union's formal orientation should be informative and convincing. New hires' views of unions are substantially shaped by the content of a union's formal orientation.

#### Recommended topics to cover include:

- An introduction to the union
- Explanation of the collective bargaining agreement
- Overview of the union's value beyond the workplace
- Description for how new members can get involved
- The case for union membership.

- **Follow up with orientation participants:** Union commitment has shown to be strongest and most lasting in new members who experience both formal and informal introductions to the union's values, accomplishments, traditions, and norms.<sup>5</sup> Informal introductions should occur via strategic follow-up. Union leaders, stewards, and other representatives should reach out to new employees in their first days on the job, establishing the union as a trusted resource for new hires. Steward outreach is particularly vital, and should happen especially quickly. Invitations to participate in union events and activities should be a part of the follow-up. Celebrate a new hire's decision to join the union.
- **Be systematic:** Administer the orientation program in a formal structure. Train orientation presenters and people tasked with follow-up. Track orientation participants to see who joins, who gets involved, and who has follow-up interactions with key union representatives. Provide checklists for union leaders, stewards, and other representatives so that they know what post-orientation follow-up to make, and can be accountable for doing so. Regularly review the overall program to evaluate if it is meeting intended goals. Make adjustments as necessary.



## International Unions Have a Role in Union New Hire Orientations

International or regional unions can play an instrumental role in ensuring a high-caliber new hire orientation program, even if local unions are typically responsible for conducting the formal orientation and outreach to new hires. Internationals can assist locals by using their economies of scale to create template scripts for facilitators, produce high-quality materials, and conduct annual new hire orientation trainings for local leaders and staff to ensure the use of best practices. International unions can also help local unions coordinate the type of tracking and data collection that is necessary to make sure that new hire orientations are contributing to new hires' choice to join the union and become active members. International unions can also contribute to the success of orientation programs simply by affirming their value and importance to the success of individual local unions and the union as a whole. Unions can build buy-in for strategic programs and initiatives by incorporating them into new hire orientations.



## Data Demonstrates Value of New Hire Orientations

Data from a longitudinal survey of new union members demonstrate the value of investing in a high-quality new hire orientation. The following is a summary of key findings from a national study of new hire orientation practices in local unions affiliated with a large national union. Paul Clark, Director and Professor of the Penn State School of Labor and Employment Relations, conducted the research on behalf of the Jobs With Justice Education Fund through a grant from Union Privilege. Survey data collection occurred in spring 2016 and spring 2017. The study gathered data from 494 new members from six different states who joined the same national union the previous year.<sup>6</sup>

The study sought to determine the percentage of new members who participated in a formal orientation program, their assessment of the quality of that experience, and the impact that experience had on their attitudes toward the union. The key attitude examined in the study was member commitment to the union. As member commitment is key to a union's strength and success, the survey included a set of questions to gauge their level of commitment. Researchers have used this set of questions for many years, and

its ability to accurately and reliably measure union commitment has been established by numerous studies. The overall measure of union commitment is made up of three dimensions: loyalty to the union, willingness to volunteer on behalf of the union, and sense of responsibility to the union.

The follow-up study was designed to measure members' attitudes and their level of participation in union activities after a year of membership. This study and prior research provide strong evidence that devoting time, effort, and money to establishing new hire orientation programs where they do not currently exist, and improving them where they do, will pay off in higher levels of member commitment and participation. It is, in sum, one of the best investments unions can make toward their long-term effectiveness as an organization.

## Key Findings

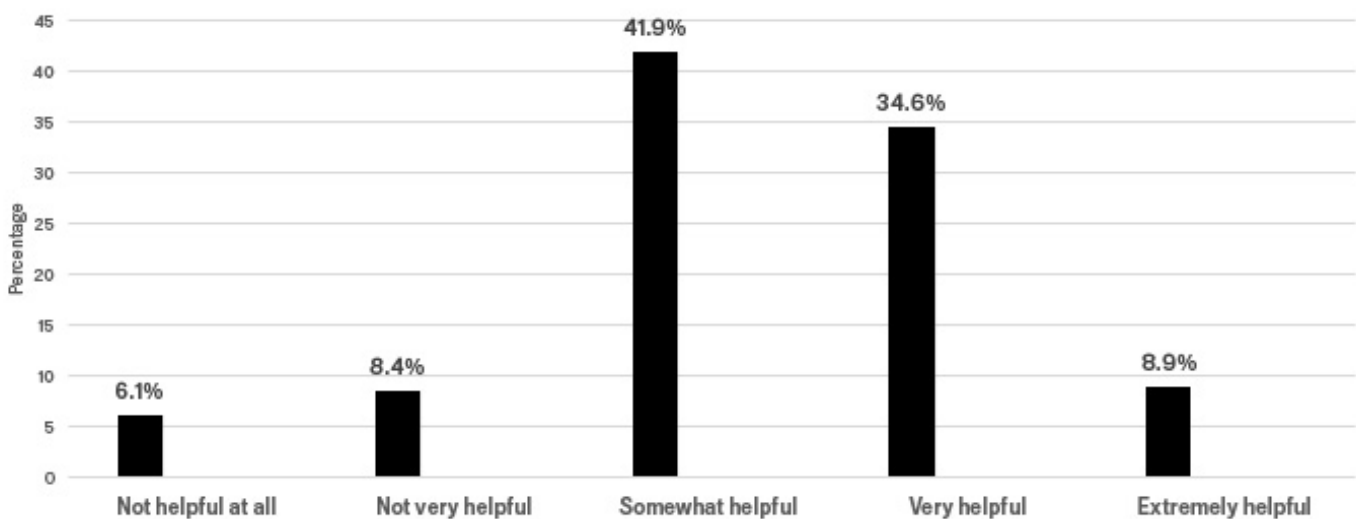
**Approximately half (46.2 percent) of new members who completed the survey indicated that they had no contact with the union during their first month as a member.** And 19.9 percent of new members reported that at the time of the survey (completed between two and 12 months after becoming members), they had had no contact with the union in their workplace. When unions fail to engage new members, they miss a great opportunity to build a committed and loyal membership base. If the only experience members have with the union in their first months on the job is having union dues deducted from their paycheck, the union is turning a chance to make a positive impression with the member into something potentially negative.

One respondent wrote: *"Initially, I was excited to join the union in my workplace. Both of my parents were union members for 30 plus years. Because of all the good that the union did for my parents, I looked forward to being a part of my own union. But since starting my job... I have yet to meet anyone from the union. My experience with the union to date is beyond disappointing. And now I wonder if I should even have joined."*

**Only a little more than one-third (37.7 percent) of new members experienced a new hire orientation.** Almost two-thirds of the local unions in this study missed a tremendous opportunity to influence new members' attitudes toward the union in a positive and significant way. While some new members may have formed impressions of unions from personal experience—like through a family member or media coverage—very few know anything about the local union they joined. Those blank slates, however, soon will be filled in by their contact or lack of contact with the union, by co-workers, and by management. Every local's goal should be to make a good first impression. In the absence of a strong new hire orientation program, the feelings new members have of the union may be undesirable. Once attitudes form, they are hard to change. One respondent commented: *"I have been with my employer for a year now and still have not met a union representative or attended a union meeting. It's like the union is invisible in my workplace."*

**Most members (86 percent) who participated in a new hire orientation found it either somewhat, very, or extremely helpful (see Chart 1).** A strong new member program is a great way to make a positive first impression.

**A majority found the new hire orientation helpful**

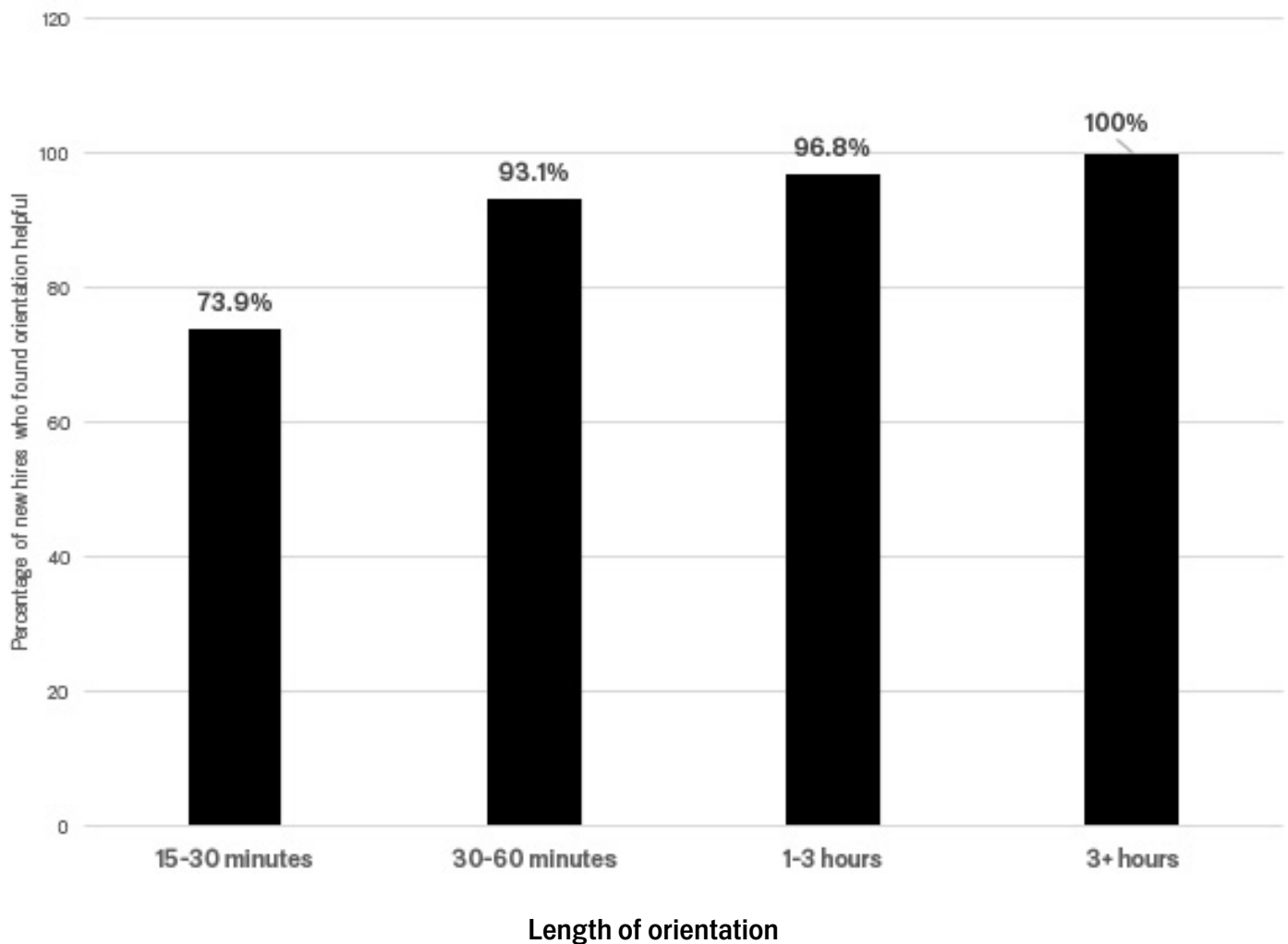


**Members who participated in a new hire orientation and found it helpful had a significantly higher level of commitment to the union than those who did not.** This finding provides strong evidence that if a local union puts in the time and effort to create a high-quality orientation for new members, the investment is very likely to pay off with deeper levels of commitment among them. New members who participated in a new hire orientation had higher levels of loyalty, willingness to work on behalf of the union, and a sense of responsibility to the union. This finding also suggests that putting resources into improving an existing orientation program will likely result in increased commitment among new members.

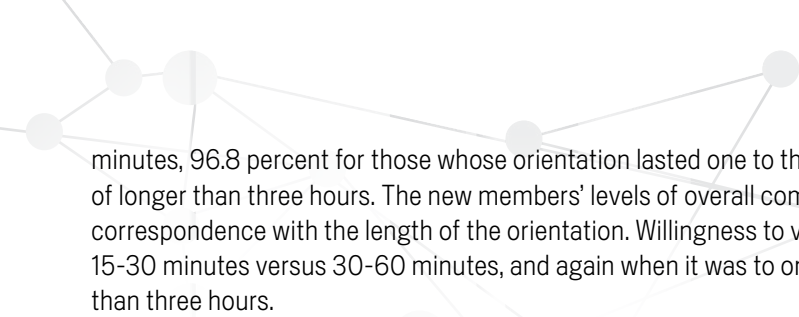
**Members who found a new hire orientation unhelpful had a significantly lower level of commitment to the union than those who had a positive experience and those who did not participate in an orientation.** This finding suggests that local unions who hold a perfunctory, disorganized, and ineffective orientation are at risk of getting off on the wrong foot with new members. For example, one respondent commented: *"Union representatives were scheduled to show up at our new employee orientation, but they did not make it. Bad first impression...."* In fact, a badly done orientation could do more damage than not doing one at all. For this reason, any local union with a new hire orientation program should take the time to review its effectiveness.

**The greater the length of the orientation, the more helpful it was viewed by new members.** The evidence indicates that lengthening the orientation time provides a stronger return on investment. The most common timeframe for orientations was 15-30 minutes. Approximately three quarters of new members who attended the 15-30 minute orientations reported that the experience was somewhat, very, or extremely helpful (see Chart 2). The number rose to 93.1 percent for new members whose orientation lasted 30-60

**Why the length of orientation matters**







minutes, 96.8 percent for those whose orientation lasted one to three hours, and 100 percent for those who attended an orientation of longer than three hours. The new members' levels of overall commitment, loyalty, and responsibility to the union also increased in correspondence with the length of the orientation. Willingness to volunteer for the union increased gradually when the orientation was 15-30 minutes versus 30-60 minutes, and again when it was to one to three hours. However, it decreased for orientations of more than three hours.

**The more informational materials and publications distributed at the orientation, the more helpful the orientation was viewed by new members.** The survey asked new members to indicate which of the following materials and publications they received at their orientation: an informational packet about the union, a union publication, a copy of their contract, a list of local union officers and contact information, an explanation of dues, and a description of services and benefits provided by the union. Seventy-six percent of members who received one of the above materials indicated that they found the orientation somewhat, very, or extremely helpful. This figure reached 82.3 percent for new members who received two materials, 96.3 percent for those receiving three, and 100 percent for those receiving four, five, or six materials.

**The greater the number of relevant topics addressed in an orientation, the more helpful the new members found the orientation to be.** The survey asked new members to indicate which of the following topics were addressed in their orientation: the role or purpose of the union, the contract, the services and activities of the local, the services and activities of the national, an explanation of dues, the structure of the local, the structure of the national, and the grievance procedure. Seventy-seven percent of members whose orientation covered only one topic found the orientation somewhat, very, or extremely helpful. This figure increased to 86.9 percent for new members whose orientation covered two topics, 85 percent for three topics, 96.2 percent for four topics, 91.7 for five topics, and 100 percent for all six.

**There was little difference in members' levels of commitment to the union in the early months of their membership and approximately one year later.** This finding includes the differences in commitment between those members who had a high-quality new hire orientation versus those who had an unhelpful experience or no experience. The information suggests that the new hire orientation experience can have more than a temporary impact on a member's commitment to the union.

**After one year of membership, members with greater levels of union commitment are more likely to participate in the union's work than members with lower levels of commitment.** Members who responded that they were more likely to volunteer for the union reported participating in union activities to a much greater degree than members who scored low on that dimension of union commitment. Members who indicated that they had a high level of loyalty also had a higher level of participation than members who scored lower on the loyalty dimension. And members who scored high on the responsibility dimension, on balance, were participating less than those who scored lower on this dimension of union commitment. This comparison is supported by the finding that overall union commitment and willingness to work are statistically correlated with participation. The relationship between loyalty and participation is also statistically significant.



# **BEST PRACTICE: Orient New Hires As Early As Possible**

First impressions matter. Introduce new hires to your union's traditions, culture, norms and expectations early. Waiting to orient new hires on the union and its value to them allows others, like an employer or friend with anti-union views, time to have more influence over a new hire's perception of the union.<sup>7</sup> Rebecca Friedrichs, the named plaintiff in the U.S. Supreme Court case that aimed to establish right-to-work limitations on the entire public sector, told a *Washington Post* reporter that she "soured on union representation" after talking with a co-worker during her first few days of teaching.<sup>8</sup>

One way unions can ensure they get to meet with new hires early on is through an employer's orientation program. Employer orientations are typically mandatory, on the clock, and during new employees' first few days on the job. If a union's own orientation is part of a formal workplace orientation program, the union has the means to interact with every new employee in person. Participation in an employer's new hire orientation can also validate the union's role in the workplace, giving it legitimacy in the eyes of new hires.<sup>9</sup>

Unions should also recognize that management may use its orientation as an opportunity to define the union and characterize the union's role for new hires at a time when they are easily influenced. Even employers in positive labor-management relationships are unlikely to tell new hires that the union and collective bargaining contributed to the good pay and benefits they are set to earn and the positive work atmosphere they are entering.<sup>10</sup>

## **Bargain for the Right to Hold Union Orientations on Company Time**

Unions can and should negotiate for the right to meet with new hires as part of the employer's orientation. See the addendum on page 24 for sample contract language that unions have successfully negotiated into collective bargaining agreements. Absent contractual language, unions should try for a memorandum of understanding or a side letter to the collective bargaining agreement. A verbal agreement with management is better than nothing, but written language helps ensure that the union preserves its right to meet with new hires should the labor-management relationship change in the future.

## **When a Union Orientation Must Be Off-Site**

Not all unions can meet with new hires on the employer's premises or during the employer's new hire orientation. In such situations, unions should still aim to meet with newly hired employees as soon as possible. Remember that a union orientation is most effective during a new hire's first few days on the job.

Since new hires presumably will not be paid for attending an offsite orientation, unions should put extra effort into making the orientation a positive, hospitable event in a welcoming environment. Good attendance will largely depend on new hires feeling that they want to be at the orientation. Free food is always a good idea. Unions may also think about pairing the orientation with a social function that will interest new hires, like a happy hour or coffee meet-up with existing members, or a professional development opportunity that will benefit new hires' careers. SEIU Healthcare Minnesota's stewards host weekly lunches for new hires at smaller facilities located in a common geographic area. The union has found that new people return to these lunches, viewing them as a comfortable space to ask questions.<sup>11</sup>

Unions may even want to think about an orientation that is for new hires and their families. Such an orientation can demonstrate that union membership is beneficial for working people and their families. Family members may also be just as interested in learning about union membership. The Northeast Regional Council of Carpenters has found that it is often the spouses and significant others of new members who want to know the specifics of the union's healthcare and pension plans.<sup>12</sup>



## When a Union's Membership Is Geographically Dispersed

Unions with geographically dispersed memberships should try for regional meetings that new hires are likely to attend. Training, professional development, and social or professional networking events can induce new hire attendance. Such dual-purpose meetings can help link the union to these valuable opportunities in the minds of new employees, thereby increasing the new hires' commitment to the union. Employers may even consider compensating new employees for attendance at dual-purpose meetings. In several states, for instance, SEIU-represented homecare providers, who are typically dispersed across a large geographical area, are paid by their employer to attend early career training, which also includes a brief union orientation for new caregivers in the bargaining unit.<sup>13</sup> When employer funding is not possible, unions should cover, or help to cover, new hires' transportation costs to a regional orientation.

If an in-person orientation is not feasible, unions with scattered memberships should consider digital alternatives if the union knows that its membership is comfortable with the requisite technology. Unions should always try to communicate with new hires through mediums that new hires prefer.

If new hires are comfortable with technology, the union can develop either scheduled online orientations or recorded webinars. Live webinars are more interactive than recorded ones, and they help ensure that people are engaged. Alternatively, self-paced online orientations allow people to complete the orientation at their convenience, while still allowing the union to track participation. Unions can offer incentives, such as an opportunity to enter a raffle, earning a discount on a professional development course, or claiming free union merchandise, to encourage new hires to complete the orientation. These incentives also encourage new hires to continue engaging with the union, setting the stage for additional follow-up.

# BEST PRACTICE: Use Intention When Selecting Facilitators

Deciding who facilitates a union's formal orientation is an important choice. Consciously or not, new hires are going to identify the union with the person who leads their orientation. If the orientation is the union's first opportunity to make an impression on new hires, the facilitator is the person who is responsible for making that impression a good one.

Local leaders are an obvious first choice for serving as orientation facilitators. They likely are experts on the collective bargaining agreement. The ability to deftly answer questions about employees' rights and obligations can inspire confidence in the union among new hires. But knowledge cannot be the only factor. Facilitators must represent the union well. The steward who has an encyclopedic knowledge of the contract, but who talks down to employees of a different age or gender, may not be the ideal person to run the union's orientation.

It is important to assess and consider how facilitators reflect the union vis-à-vis the new hires. Think intentionally about factors like race, age, gender, language preferences and other characteristics that may influence a person's decision to join the union. Using two facilitators can help ensure that new hires have access to knowledgeable staff and can see that the union consists of a diverse membership. One union has made it a practice to have younger, engaged members co-present with a more experienced leader or representative.



## When unions represent people in geographically dispersed locations

Operating a high-quality new hire orientation program can be more challenging for unions who represent people in geographically dispersed or non-traditional workplaces—but it's not impossible. In these scenarios, unions can employ the following strategies to encourage new hires to sign up and become active, committed members:

- Institute dual-purpose meetings in place of a formal orientation session on an employer's premises or during an employer's new hire orientation. Consider organizing enticing events, like a training seminar or professional development workshop, or a welcome happy hour or coffee meet-up.
- If new hires are comfortable with technology, the union can develop scheduled online orientations or recorded webinars.
- Be aware of new hires' preferred means of communication. Is it better to send welcome information via email or regular mail? Are videos better than words? Use communications modes in the most impactful way.
- Invest in high-quality welcome packets that include a welcome letter from an elected leader, information about the union, an overview of member-only benefits, and free union gear and goodies. The welcome note should emphasize the value of becoming an active member.
- Ensure prompt follow-up. A quick call or brief email from an elected leader, key staff person, steward, or another union representative can help demonstrate that the union is interested in meeting the specific needs of every new hire.



# BEST PRACTICE: Present a Positive, Substantive Introduction to the Union

The amount of information new hires acquire during their formal union orientation largely influences their views of the union. At the same time, unions must be cognizant that “it is the quality of the program and not simply participation in [an orientation], that is important in influencing the attitudes of new recruits.”<sup>14</sup>

## Prepare Ahead of Time

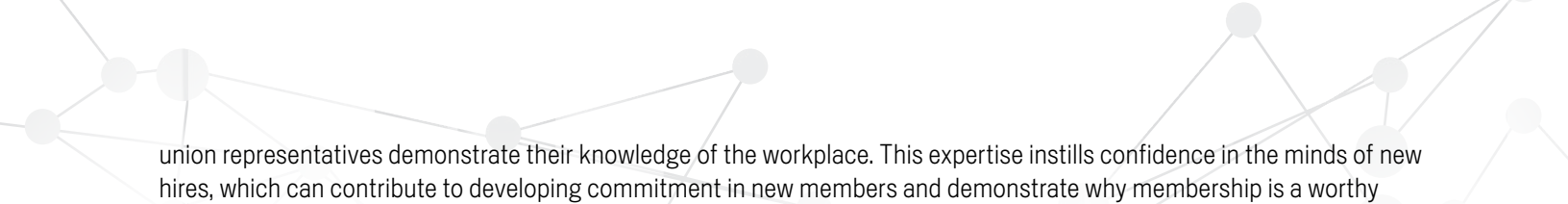
Just as people are more likely to follow through on an early-morning exercise goal when they lay out their workout clothes the night before, so too are unions more likely to have a high-caliber orientation program if they prepare ahead of time. Put together material packets well before the day of the orientation. Spend time reviewing the presentation outline and practicing the speech, even out loud. Consider what questions a new hire may ask, and have answers ready.

If the employer hires new employees intermittently in large numbers, unions should be able to anticipate or be willing to help locals plan and predict when the hiring will occur. The National Association of Letter Carriers, for instance, knew through negotiations with the Postal Service that it would see substantial numbers of new employees, and planned at the national level how to orient them to the union.<sup>15</sup>

## What to Say

The orientation’s content should educate new hires about the specific ways that they benefit from union membership. While every situation is unique, most unions will want to develop a presentation for new hires that introduces the union, explains the collective bargaining agreement, discusses what the union does beyond the workplace, describes how new members can get involved, and, ultimately, makes the case for new hires to join the union. Educating new hires about what the union does for individual members can overcome anti-union stigmas and political biases. “We’ve found, for the most part, that we’re able to overcome [external factors like politics and ideology] just by talking about the National Association of Letter Carriers as a whole,” reports Brian Renfroe, who oversees the union’s orientation program.<sup>16</sup>

- **Introduce the union:** Provide an overview of the union’s history, its key achievements, and an explanation of the union’s structure. The union’s history and accomplishments demonstrate how the union has won tangible benefits for employees, and can underscore the role that active, committed members played in achieving those benefits. The history and past achievements also demonstrate that new hires are part of something larger than any one individual, which may help develop a commitment to the union. Explaining the union’s structure allows for an accurate depiction of how unions operate. Describe the local union’s relationship to the regional and international levels of the union, and explain the international union’s relationship to the broader labor movement. IUE-CWA includes a simple diagram of its internal structure and relationship to the national AFL-CIO, state labor federations, and central labor councils in its new member welcome packets.<sup>17</sup> Describe also how the union’s structure and relationship with other unions benefits employees in the orientation (e.g., “The international keeps us abreast of national issues affecting our jobs and our industry”; “When unions stand together, we can win fights, like protecting American jobs from bad trade deals, that would be harder to win alone”). Demystifying the labor movement and the internal operations of unions is important, especially since new hires will hear misconceptions, half-truths, and outright lies about unions from a variety of sources.
- **Explain the collective bargaining agreement:** The collective bargaining agreement is perhaps the most tangible example of how unions improve working conditions for employees. It should be obvious that unions need to explain to new hires the rights enumerated in the contract, particularly pay and benefits. In deciding what other contract provisions to review during the orientation, several unions have looked to their existing membership to guide them. These unions focus on the contract language that members most often ask union representatives about. Nurses’ unions may clarify how overtime is assigned, while a manufacturing union may focus on employees’ right to work in a safe environment. In explaining the contract,



union representatives demonstrate their knowledge of the workplace. This expertise instills confidence in the minds of new hires, which can contribute to developing commitment in new members and demonstrate why membership is a worthy investment. Unions can also build confidence by showing new hires how the union will protect employees. A creative way to do this is to identify incorrect or partially inaccurate information that management shares with new hires during its own orientation. At one hospital, the union realized management was not correctly explaining the 401(k) system to new nurses. The union's representative asks new nurses if they heard the incorrect information from the employer. When the nurses respond affirmatively, she explains the correct 401(k) information. Even the most cynical new hire is appreciative that the union representative saved her a few hundred dollars in retirement savings. At the same time, union representatives should be prepared to address concerns from new hires about not wanting to cause any trouble with management, particularly when talking through the grievance procedure. Present grievance procedures clearly, but don't dwell on them. It is understandable that new hires want to make a good impression as they start work for a new employer. One representative of a professional union faced with this question responded by explaining that the union's role is to ensure that the employer applies the discipline process fairly and correctly.

- **Discuss what the union does beyond the workplace:** This is another portion of the orientation in which it is important to emphasize the ways that the union improves the lives of members, including the new hires in attendance. Don't assume people will know why unions choose to participate in politics or engage in community service. And when it comes to politics, do not shy away from the role of unions. Explain how the political process affects the day-to-day lives of members, speaking to the values of the union and the values of the new hires. Unions of nurses may want to point out that legislated staffing ratios allow nurses to provide quality care. Unions of artists and entertainers may explain how tax credits create work opportunities for members. Unions of manufacturing employees can focus on efforts to stop bad trade deals and close loopholes that lead to offshoring. Professional unions can have a particular challenge building commitment to the union, since highly skilled individuals may feel that they do not need to rely on a union. Here it can be a good idea to explain the union's role in advancing the profession (e.g., pilot unions have advanced the role of the profession in the advancement of air travel; nurses' unions protect patients and the health care industry; arts and entertainment unions protect the crafts of writing, acting, etc.). Articulate the idea that part of being in the profession means being supportive of the union, because the union has a role in advancing the profession. The Michigan Education Association talks to new hires about how joining a union better allows them to become "a voice for public education in Michigan."<sup>18</sup> Such a message may capture individuals who are lukewarm to unions, but committed to their profession.
- **Describe how new members can get involved:** Orientations are a key moment for recruiting people who join the union to get involved, thereby boosting commitment. "There is a link between the degree to which [a member] participates in union activities and the member's level of commitment to the union."<sup>19</sup> Recruitment need not be elaborate. Many people want to be involved in their unions but are not asked or not shown how. Making the first ask at an orientation is pragmatic, since it eases the process for new members to get involved. Even new members with the best intentions to participate get distracted by life's daily events and may procrastinate on getting involved in the union if sign-up occurs at a later date. Describing how new members can get involved also allows the union to showcase the wide variety of activities in which members can participate. Doing so increases the chances that new hires will find an activity that appeals to their interests. "Getting people involved is always about whether they feel their issues can be addressed by the union," explains Alantris Muhammed, a member-organizer for SEIU Healthcare Illinois.<sup>20</sup> Let new hires know about the union's community service, political committees, recreational sports teams, and any other union activities open to members. Do not forget to emphasize member activities that are for the whole family, which can help demonstrate that the union is there for members' families too. Telling new hires that many members participate in one union activity or another can encourage participation since people tend to do what is popular. Explaining to new hires that members are expected to participate can also encourage follow-through, by establishing a norm. Such an explanation also helps new hires see the union as an "us," rather than an institution separate and apart from the members.
- **Make the case for union membership:** Unions should also clarify that certain benefits are only available to full, dues-paying members. Providing a calm, matter-of-fact explanation can help win over new hires who are "on the fence" about joining, and don't realize all that union membership has to offer. Referring to non-members as free riders or in other antagonistic terms may turn off people who were considering joining. A handout or PowerPoint slide showing side by side the number of benefits and opportunities available to full member as compared to fee payers or non-members illustrates the benefits of full membership. Unions may also want to make clear that certain benefits are only available to people who choose to be full, dues-paying members. The advantages could include membership in professional organizations, free subscriptions to union and professional

publications, scholarships, and discounted opportunities for career advancement assistance. Also explain exclusive member benefits like Union Plus, which can provide people and their families with significant savings. These benefits may be particularly important for new hires who worry that union dues are an expense that they simply cannot afford. Members-only benefits also provide a practical reason to join and remain active members, which has shown to be critical for recruitment and member retention in membership organizations of all types.<sup>21</sup>

## How to say it

Unions should overall aim to speak to their values. Many new hires are likely to relate to or to connect with at least some of a union's values, if not all of them.<sup>22</sup> The Registered Nurses Association at the University of Cincinnati Medical Center explains to newly hired nurses that the union participates in the political process to “get things done that are good for us, good for our patients.”<sup>23</sup> Honing in on the union's role in advancing patient care speaks to the new hires' nursing values.

Facilitators should also find ways to talk about the union as “we” to develop a sense of identity, rather than talking about the union as a third-party institution that is separate and apart from bargaining unit members.

Facilitators should also remain upbeat and positive, even if the union has an antagonistic relationship with management. New hires must associate joining and forming unions with a move toward something positive. This is an important time to demonstrate that unions are a source of solutions, and not a source of problems. New hires do not know any past bad history with management and do not want management to view them as troublemakers. This also means that old “war stories” and overviews of unions' histories should be balanced with examples of modern-era gains to demonstrate unions' currency and efficacy in today's workplace. If there is a compelling need to mention some of the current problems and their origin in the workplace, do so without making the harms sound so dire that change seems impossible.

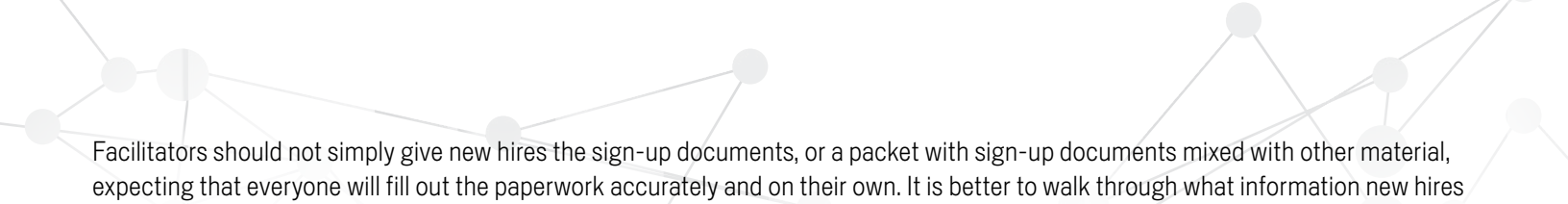
An effective guide on how to frame what you say in your orientation can be found in message research commissioned by the AFL-CIO in 2016. The study identifies language that boosts internal organizing and commitment among private- and public-sector union members. It also identified messages that make a compelling case for working people to support and join unions, for both English and Spanish speakers.<sup>24</sup> Extrapolating this advice to new hires could prove useful.

Recommendations include resisting the inclination to describe “the union” as a third party that acts for people, and instead using terms that give members agency, such as “joining together”; replacing terms that people don't identify with, like “worker,” in favor of humanizing terms such as “working people”; describing how unions lead to gains, both individual (“make life better for our families”) and collective (“make our workplaces more fair”); avoiding absolutes in terms of condemning all bosses or rich people and lauding all working people; naming improvements in terms of their real impact (“helping a kid pay for college or retiring securely”—not simply “wages, benefits, and working conditions”); and reinforcing the value of relationships among people at work and in the union. Messages that make appeals to the transformative community achievements of unions held the most appeal to survey respondents who were not members of their union, or were not supportive members (e.g., “Joining together helps bring change because there is power in numbers, joining together is how we make improvements in our communities”). Conversely, messages that focused on joining an existing union were less appealing to non-members (e.g., “Forming a union helps me achieve more at work, forming a union makes my life better”).

## Signing Up New Members

A crucial, if not the primary, objective of the formal orientation is to sign up new members. While being mindful of legal requirements, unions should strive to make the sign-up process as simple as possible for new hires. Require new hires to provide only the information that is absolutely necessary for establishing their membership in the union (e.g., if providing a Social Security number is optional, do not ask for it). Unions that represent people in freelance jobs, particularly those without a formal workplace, should make it easy to sign up online, especially if that is the memberships' preferred channel of communication.

The sign-up process should include an explanation of how someone joins the union, and a request that they do so. “The last thing I ever want to happen is for someone to not be a member because no one ever asked them,” explains the NALC's Brian Renfroe.<sup>25</sup>



Facilitators should not simply give new hires the sign-up documents, or a packet with sign-up documents mixed with other material, expecting that everyone will fill out the paperwork accurately and on their own. It is better to walk through what information new hires need to provide, and what options must be marked to become a member. This can include an explanation of how soon new hires will be able to access their membership benefits and when dues are processed and debited. Unions should present the cards and related forms with confidence. Assume the new hires want to join the union. Being indirect about the sign-up process may unintentionally make new hires unsure if all they are receiving all the relevant information.

Explaining the sign-up process also ensures that everyone who wants to join the union does so. Several unions report that some new hires do not know at the orientation that they did not fully join the union, and only later realize the mistake when they attempt to use a members-only service. Helping these individuals properly sign up for the union ensures they get immediate access to the membership they wanted, and guarantees the union does not lose out on dues money and the potential participation of new active members.

There are still opportunities for unions to educate members about the benefits of union membership with individuals who initially decide against joining. The Michigan Education Association developed a useful approach to sign up new members in a right-to-work environment. When new hires indicate that they do not want to join the MEA, a facilitator asks them to complete a “non-member informed consent form.”<sup>26</sup> This document lists all the rights and opportunities the new hires are choosing to decline by not joining the union. The facilitator walks them through every item, creating the opportunity to explain one more time the value and benefits of union membership. The MEA reports that many new hires who initially decline to join the union eventually decide to sign up after reviewing the non-consent form.<sup>27</sup>

Facilitators do not want to make joining the union seem like a controversial step. An industrial union in a right-to-work state trains its facilitators to talk with new hires in a positive manner that presumes they will want the benefits of joining the union. This union does not make a hard sell. Its facilitators present the union application as matter-of-factly as any other paperwork.

## **Don't Oversell**

While orientations are a time to show the value of union membership and to convince new hires that it is in their best interest to join the union, facilitators should never overstate what they can deliver to members. Behavioral research indicates that overselling the benefits of an organization can decrease commitment.<sup>28</sup>

Unions should make sure that new hires' expectations are accurate. At Ohio State University, orientation facilitators for the nurses' union clearly explain to new hires the hospital rules they will follow. For example, they describe the hospital's seniority-based vacation request system. New nurses understand that there is no guarantee during their initial employment of obtaining the specific days off work they may request, but facilitators provide tips for improving their chances.<sup>29</sup>

IBEW's System Council U-19 uses its orientation to explain the union's Code of Excellence. “The company has requirements of you...the IBEW has requirements of you also” is how IBEW's Casey Shelton puts it to new employees.<sup>30</sup> New hires should understand that the union can be there to guarantee a fair discipline process, but it cannot get them out of trouble if they are found to have violated company policies.

## **Be Adaptable to Real-World Dynamics**

Unions must be able to adapt orientations to real-world circumstances. For instance, the NALC permits its branches to adapt the formal orientation by region, recognizing that union familiarity is different in the Northeast than in the Southwest.<sup>31</sup>

Unions should also understand the specific situations of new hires. Some new hires may be recent graduates struggling with student debt and concerned about being able to afford union dues. If the union offers discounted dues for recent graduates, make sure new hires know this. It can also be helpful to describe career advancement opportunities that union membership affords new hires, demonstrating that membership is an investment that will pay dividends.

Facilitators should also be aware of the new hires' schedules. For example, if the union's orientation is the final session of the employer's week-long new hire orientation, recognize that participants will be tired and perhaps less able to absorb a significant amount of information in a short period. In such a situation, structure the orientation to focus on making overall points about the value of the union, rather than a detailed description of the contract.





## **BEST PRACTICE: Encourage New Hires to Become Active Union Members**

The formal orientation should not be viewed just as a moment to sign up new members. It is also a crucial opportunity to begin developing strong, committed members, by encouraging new hires to become active in the union.

When new hires turn in completed membership forms, ask them to participate in the union's activities, and make it possible for them to do so instantaneously. Create a simple form that lets new members indicate which activities interest them. The form should broadly describe the activities (community service, politics, veterans' issues, recreational sports teams, etc.), so the form does not take long to complete. Activity leaders or heads of the respective committees should then immediately follow up with the new members and add them to the relevant distribution lists. The follow-up creates another opportunity for informal socialization. If the union has an upcoming event or action, provide a way for new members to sign up for it at the orientation.

Unions can also encourage participation by quickly adding consenting new hires to the union's communications channels, such as text message alerts, email lists, and mailing lists. If time permits during the orientation, facilitators should ask new hires to follow the union's (and applicable leaders') social media channels via their phones during the orientation if time permits. These channels should, of course, be well maintained and regularly updated.

Even unions without formal, in-person orientation sessions can encourage participation. The first paragraph of SMART Transportation Division's welcome letter to new members, signed by the division's president, explains the value of member participation. New SMART Transportation Division members are told that active involvement in the union will help make the union stronger, and increase new members' career "fulfillment and satisfaction."<sup>32</sup> Tying union participation to career fulfillment helps demonstrate that individuals can enhance their careers and commitments to a given profession through union membership. In its welcome letter to new members, the IUE-CWA promotes the importance of participation by stating, "You, as an individual, can make a difference."<sup>34</sup> Emphasizing participation from the get-go helps establish participation as a membership norm.



# **BEST PRACTICE: Provide Handouts and Freebies**

Unions should always hand out materials to orientation participants. Researchers surveying new members who had been through a union orientation found that the participants appreciated receiving written materials about important issues.<sup>34</sup> Multimedia presentations also help increase comprehension among orientation participants.

Recommended items to distribute in orientations include:

- Basic information about the union
- A copy of the collective bargaining agreement
- Contact information for local officers and stewards
- An overview of member-only benefits
- A recent union publication, such as a magazine or newsletter.

Unions can also look to external sources for orientation materials. For instance, Jobs With Justice provides a range of quick “101” tutorials on unions, collective bargaining, and other issues impacting working people available at [www.jwj.org/issue-briefs](http://www.jwj.org/issue-briefs).

Unions should also hand out branded freebies at their formal orientations. People like free stuff, and they like to show that they are a part of something. “If people join something or become a member of something, they like to have something that identifies them with that organization,” observes Brian Renfro in explaining why the NALC hands out free T-shirts at its orientations.<sup>35</sup> Giving new hires free union gear and goodies can build an identity with the union inside and outside the workplace, and it does not need to be limited to in-person formal orientation sessions. Many unions mail small union-branded goods to new members. The Brotherhood of Railroad Signalmen, for instance, sends union stickers that new members can place on their work helmets. Union gear also contributes to longer-term commitment and identification with the union. “There is power in being able to show they belong,” Renfro notes.<sup>36</sup>



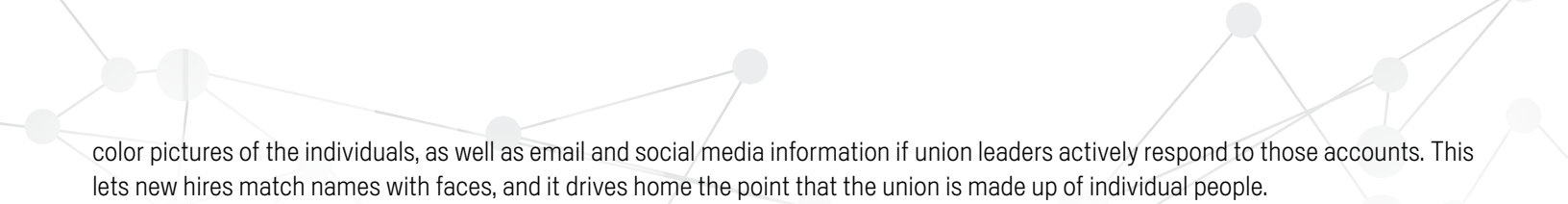
# **BEST PRACTICE: Strive for Quality in Everything**

Quality matters for the success of a union orientation program. In a study of new union members, it was the quality of formal socialization experience that shaped the commitment level of new members.<sup>37</sup> That is because new hires who attend an excellent orientation and receive high-quality materials will likely view the union as high quality too. An orientation program with low-quality content and materials can create the opposite impression of the union.

## **Develop Quality Materials**

Top-notch, professional-grade materials featuring a modern design do much to establish a sense of quality and contemporary relevance. Alternatively, low-quality materials, such as outdated documents with incorrect information, grammatical mistakes, or poor formatting, can create the impression in new hires that the union is low quality.

Fortunately, unions can take simple steps to produce high-quality products that make a positive impact on new hires. In general: Print in color, use pictures, and ensure information is current. A contact list for union officers and stewards, for instance, should include



color pictures of the individuals, as well as email and social media information if union leaders actively respond to those accounts. This lets new hires match names with faces, and it drives home the point that the union is made up of individual people.

International unions can assist locals with developing high-quality materials. The international unions can take advantage of their economies of scale and access to communications specialists to create engaging materials for non-local information, such as the history of the union or the value of union membership. The NALC resources its orientation program through its national headquarters and administers it through its regional offices to the local branches.<sup>38</sup> IATSE's international office produces a new member packet that includes a colorful, glossy folder boldly establishing the IA as “the Union Behind Entertainment.”<sup>39</sup> Within the folder are high-quality, glossy color inserts, including a welcome letter from the international president and general secretary-treasurer, information on connecting to the union's social media pages, an overview of benefits, and a copy of the union's most recent magazine.

## Know Your Audience

Understanding how new hires prefer to communicate, and catering to those preferences, helps to create a quality orientation program. Even the best arguments for joining the union and getting involved in it are only effective if new hires receive and comprehend them. Unions should think about how new hires receive information. Professors and lawyers probably have different needs than manufacturing workers.

Unions should also be aware of new hires' preferred means of communication. Is it better to send welcome information via email or regular mail? For a union with widely spread members who are more connected online than through a physical workplace, the digital option is probably best. The membership of the Writers Guild of America East includes many freelance writers who on any given day could be working in coffee shops, homes, or even airports. WGAE's new members receive an email from a staff person welcoming them to the union and explaining who can answer benefits questions. The same staff person will follow up shortly afterward with an e-invitation to the union's new member reception.<sup>40</sup>

A video clip can be a good way to present information to people, especially those who cannot attend an in-person orientation, in a less dry, more entertaining manner. The formal new hire orientation of the Registered Nurses Association of UCMC starts with a brief, humorous video intended to drive home the point that it is unions, not companies, who have continually fought for and won basic economic protections for employees and their families over the years.<sup>41</sup> At its new member orientation, SAG-AFTRA NY plays a montage of interviews collected from the SAG Awards in which established members talk about what the union means to them.<sup>42</sup>

Use communications modes in the most effective way. If most people joining the union read email on their phones, it is a good idea to make sure the union's electronic communications are optimized for viewing on mobile devices. If substantial portions of new members speak a language other than English, consider developing materials in their native tongue. The United Farm Workers of America produces new member packets in Spanish, the primary language of most of its members.

When talking about the union, discussing contract information, or explaining the labor movement, always try to avoid jargon or insider shorthand. New hires may feel isolated from conversations that become overly technical or rely on unfamiliar acronyms and abbreviations. Isolated individuals may, in turn, feel less connected to the union, and therefore less willing to join or be active members. Referring to the union in the third person (“they” rather than “we”) should also be avoided, as it can create a sense of separation between the union and the members and new hires present at the orientation.



# BEST PRACTICE: Follow Up With Orientation Participants

New hire engagement should continue beyond the formal orientation session. Unions should think about cultivating a positive attitude toward the union in new hires as an “ongoing activity.”<sup>43</sup> Following up with new hires soon after they attend the union’s orientation is essential for fostering union commitment. SEIU Healthcare Minnesota aims for three interactions with new hires in their first 90 days of work.<sup>44</sup> Behavioral research indicates that new organizational members tend to be active seekers of information, especially about issues most important to them.<sup>45</sup> Follow up also allows unions to demonstrate through words and deed that membership is in the best interest of new hires, and it can allow unions to identify the specific needs of new hires.

## “Formalize” Informal Follow-Up

Since informal follow-up does not occur in a structured setting, unions should create structures to ensure that follow-up happens. Develop checklists for the actions union leaders, stewards, and other representatives need to take once new hires complete the union’s formal orientation. A checklist creates accountability, especially when there is someone assigned to track new hire follow-up.

The union’s local leadership should welcome new hires to the workplace. Depending on the circumstances, union leaders can reach out to new hires in person, over the phone, through email, or via regular mail. A welcome note from the local union president to new hires can encourage them to join the union, and outline why union membership is good for them and their families. Such a letter is a simple gesture of goodwill that can help seed a positive view of the union in new hires. Knowing that a busy leader took the time to welcome a new hire personally can create a meaningful, positive impression of the union.

International unions may have access to sophisticated email marketing programs that can automate some follow-up, easing the burden on local leaders and staff. With these email programs, for instance, it is possible to schedule a series of follow-up engagement emails—including welcome notes, surveys, newsletters, reminders about webinars, etc.

Steward outreach is particularly vital. “Research has suggested that... perception of the steward has a significant influence on [the] perception of the union.”<sup>46</sup> Unions should alert stewards when new hires start working in their jurisdiction and mandate that stewards reach out to the new hires within their first 24 hours on the job. The steward should welcome a new hire to the workplace, offer to show the person around, and provide simple tips and pointers to ease adjustment into a new work environment. The union can even prepare business cards for the stewards, with their contact information and other key union contact information, to hand out to new hires.<sup>47</sup>

Unions can also consider developing a welcoming committee to assist stewards and leaders with engaging new members. Nurses’ unions in Ohio created a network of volunteers to serve as union ambassadors within their hospital departments, to better facilitate communication among members. The ambassadors are notified when new hires have started working in their designated area, and they are asked to introduce themselves and welcome the new nurses to the area. Operating an ambassador program requires minimal training, asks little of existing members, and provides the dual purpose of engaging new hires and deepening participation of existing members.<sup>48</sup>

Welcome committees can be an ideal post-orientation tool for unions that have large member-to-steward ratios or represent people in decentralized workplaces. When members do not work side by side, ambassador outreach can take place via phone and email. The union just needs to provide a simple script and suggested talking points.

## Encourage a Continued Relationship With the Union Orientation Facilitator

Another way to ensure follow-up with new hires is to create continued relationships between the orientation facilitator and new hires, as the facilitator is likely the only union representative that new hires know in their initial period of employment.

Such follow-up is easiest when the facilitator works alongside the rank-and-file members in the workplace. When this is the case, the facilitator should make it a point to tell the new hires that s/he will see them at work, and follow through on it.

Even if facilitators are union officers or staff members who do not regularly work alongside members, they should find ways to be visible in the new hires' workspaces. A nurses' union has made it a point for union officers and key staff members to do "rounds," visiting nurses on the hospital floor. Such a program allows new hires to see that union representatives are engaged in bettering their workplaces and available to meet with members.

The members who conduct orientations for SAG-AFTRA's New York local encourage participants to follow them on social media.<sup>49</sup> Even this simple act helps to connect new hires to the union and reinforces a positive view of the union, one that posits the union as made up of people and not just an institution.

## **Invite New Hires to Meetings, Events, or Actions**

Post-orientation follow-up should also include an invitation for new hires to attend a union event. If possible, extend invitations to a range of events, to identify new hires' personal and professional interests. Learning what appeals to new hires allows unions to engage more effectively with them on relevant issues and activities, increasing the likelihood they will develop a positive attitude toward the union and to participate in union activities. WGAE invites new members to professional development workshops that it hosts, creating an opportunity to strengthen and build the connection between the union and the craft of writing, and also to develop and strengthen personal relationships between new and existing members.<sup>50</sup>

Invitations should be strategic. Be careful that new hires get invited to events and activities that are effective and positive. For instance, new hires should only be invited to the next monthly union meeting if it is well attended and demonstrates the breadth and scope of the union. If only a few members attend monthly membership meetings, or if those who attend complain about the union, such events will not foster good impressions among new hires.

## **Create Rituals to Celebrate New Hires Who Join the Union**

The unions should play up the fact that it is now a part of a new member's life. If unions already have initiation ceremonies or rituals to recognize new members, they should maintain and improve them as necessary. Unions that lack initiation ceremonies or welcoming rituals should create them. Rituals can include:

- o Recognizing new members at their first union meeting, including providing a round of applause from other members and the presentation of a small token of appreciation.
- o Written recognition of new members in the union's newsletter or other member communications.

Actors' Equity, the union for stage actors and stage managers, exemplifies this practice. Equity members celebrate the moment they join the union. The union takes photos of new Equity members with their union cards at their orientation session. Soon after, the union posts these pictures on social media channels, and encourages the new members to do the same on their social media accounts.<sup>51</sup> A public celebration of a person's induction into the union helps develop commitment and a positive attitude toward the union, while also creating free, positive public relations exposure for the union.

## **Provide New Members With Mentors**

Most people enter union jobs without an in-depth understanding of the labor movement or the knowledge that comes from growing up in a union family. Mentors help fill that gap, informally educating new members about the value of the union, getting the most out of membership, and membership expectations.

Unions cannot assume mentor relationships will develop on their own. A mentorship program provides structure and guidelines for cultivating these relationships and ensuring new members have a positive introduction to the union. Establishing a mentor program can take some time, but once established, it need not require a substantial time commitment to administer. Mentorship programs are also helpful for promoting diversity within unions, offering women and people of color new to the union an experienced confidante who they may feel will better understand their concerns.

Mentorship programs may be particularly valuable for unions representing people who experience volatile or irregular work schedules, such as in the construction trades. Before starting a mentorship program, the Northeast Regional Council of Carpenters found that some new members, not knowing what to do when they experienced the cyclical layoffs that are a feature of the construction industry, switched to non-union companies. The NERCC's mentorship program provided an opportunity for seasoned members to help new members weather the downturns in work and educate them about the long-term benefit of a union construction career.<sup>52</sup>

The NERCC mentorship program is overseen at the regional level and administered by rank-and-file coordinators in the locals. The union recruits mentors from leadership and active members based on language needs, race, and gender. NERCC assigns mentors between three and five new member mentees.

The program encourages mentors to call their mentees every two weeks for the first two months of the mentorship, and then once per month for the following four months. The union provides mentors with a call sheet that provides basic guidelines, conversation starters, and "trigger questions" intended to induce a mentee's participation in the union. The sheet, which is turned in to the local coordinator for tracking, also provides space for mentors to flag any necessary follow-up from the union. Mentees are also asked to attend six classes intended to provide skills for working in the construction industry. Classes range from safety on the job to public speaking to budgeting money. Mentors are asked to attend three classes with their mentees to help develop the relationship.

While some training for mentors is required, it need not be elaborate. "We wanted mentors to know who to say to call with a question about the health plan, not to be the health plan expert," reports Liz Skidmore, who oversees NERCC's mentor program. For that reason, NERCC created a comprehensive training tool kit for the mentor coordinators but a more general informational packet for mentors.



## Follow-up strategies

Informal follow-up is crucial for encouraging new hires to become active, committed union members. Here are some approaches for engaging with new hires beyond a formal orientation:

- "Formalize" the informal follow up by developing checklists for the actions union leaders, stewards, and other representatives need to take once new hires complete formal orientation. A checklist creates accountability, helping ensure follow-up happens. Pay attention to race, gender, age, and even occupation of a new hire when considering who from the union conducts informal outreach with him or her.
- International unions may have access to sophisticated email marketing programs that can automate some follow-up, easing the burden on local leaders and staff. These programs make it possible to schedule a series of follow-up engagement emails—including welcome notes, surveys, newsletters, reminders about events, etc.
- Encourage a continued relationship with the union orientation facilitator, who is likely the only union representative that new hires know in their initial period of employment. When facilitators work alongside new hires, they should make it a point to tell the new hires that they will see them at work, then follow through on it. Union facilitators should consider inviting new hires to follow them on social media if they have an active, positive presence.
- Invite new hires to meetings, events, or actions. If possible, extend invitations to a range of events, to identify new hires' personal and professional interests. Only invite new hires to events and activities that are effective and positive.
- Create rituals to celebrate new hires who join the union. Play up the fact that the union is now a part of a new member's life. Rituals can include recognizing new members at their first union meeting or spotlighting new members in the union's newsletter or other member communications.
- Provide new members with mentors. Mentors can help informally educate new members about the value of the union, getting the most out of membership, and union expectations. Mentorship programs may be particularly valuable for unions who represent people that experience seasonal employment or irregular work schedules. Mentorship programs are also helpful for promoting diversity within unions.



# **BEST PRACTICE: Aim to Be Systematic**

Unions must develop, implement, and administer their orientation programs, including both the formal and informal elements, in a thoughtful, intentional manner to ensure long-term success. The NALC's leaders credit the success of their orientation program in part to its systematic design. "We wanted to be sure we gave a structure to it, and gave our organizers in the field all the tools they would need," says Brian Renfroe.<sup>53</sup> Processes, procedures, and evaluation methods all help ensure that unions consistently offer high-caliber orientations.

## **Monitor the Orientation Program**

Measurement and monitoring drive a systematic approach to union orientation programs. Unions should track which new hires attend the orientation, join the union, get involved, and have informal interactions with core union representatives (leaders, stewards, ambassadors, etc.). This data will tell unions how well their orientation program is operating based on rates of sign-up, engagement asks, and participation rates. Unions can also track specific elements of their program—for example, recording which new hires get free T-shirts and which get bumper stickers—to see how different orientation strategies affect sign-up and activism rates among new hires.

## **Provide Training for Facilitators**

A systematic orientation program should also include training and development opportunities for orientation facilitators. Teamsters Local 728, based in Atlanta, conducts a two-hour training for member activists who serve as orientation facilitators. The activists participate in exercises meant to get them thinking about what they value about working at their company and how it relates to the union. The activists get a chance to practice their speeches to new members at the training. The Teamsters training also prepares activists to respond in a positive manner to new hires who are skeptical about the union's value, as well as to expect inquiries about the necessity of dues.<sup>54</sup>

It is important to prepare orientation facilitators to calmly, credibly, and genuinely address even ardent anti-union attitudes or questions, rather than shutting down questioners. Tone and both verbal and non-verbal reactions influence the way all orientation participants view the union, not just the person asking the question. In answering such questions, "get to a personal story," recommends Robert Weitzel, vice president of the RNA at UCMC.<sup>55</sup>

## **Engage in Continuous Improvement**

Unions should regularly review their orientation program to make sure it is meeting its intended goal, and if it is not, make the necessary adjustments. "Those that are really good at [new hire orientations] self-reflect and assess, and have evolved into what they have found to be the most successful [approach]," points out the NALC's Brian Renfroe.<sup>56</sup>

One approach to continuous improvement is the use of participant surveys. A few simple questions can help unions determine if their orientation programs are convincing new hires to join the union and become active, committed members. Actors' Equity asks participants to answer a quick pen-and-paper survey at the end of every orientation.<sup>57</sup>

## **Reward Successful Orientation Programs and Recognize High-Achieving Facilitators**

Unions should encourage leaders and staff to invest the time and effort necessary to run successful, high-caliber orientation programs. International unions can acknowledge locals that sign up the most members at orientation. The NALC magazine recognizes branches with top-performing orientation programs.<sup>58</sup> Locals can track performance outcomes to motivate facilitators and other people involved in the orientation program. Teamsters Local 728 publishes recruitment totals, letting facilitators know how they are doing compared to others on signing up new members.<sup>59</sup> A ranking system builds healthy competition into the orientation program, encouraging facilitators, stewards, ambassadors, and other union representatives to sign up, follow up, and make outreach to new hires.



# ENDNOTES

1. This guide draws heavily from Chapter 4, "Union Member Orientation and Socialization," of Paul Clark's *Building More Effective Unions*, 2nd edition (Ithaca, NY: ILR Press, 2009).
2. Clark, 2009
3. Ibid.
4. Ibid.
5. Ibid.
6. This represents a response rate of 33 percent of all surveys mailed. A follow-up survey of the same group was conducted in spring 2017. The results include 121 completed and returned surveys with a response rate of 25.4 percent. While the sample from the second survey is smaller, there are sufficient respondents to draw some general, and important, conclusions.
7. Clark, 2009
8. Brown, E. (2015, Aug. 11). "Two teachers explain why they want to take down their union." *The Washington Post*. Retrieved from: <https://www.washingtonpost.com/news/education/wp/2015/08/11/two-teachers-explain-why-they-want-to-take-down-their-union>.
9. Clark, 2009
10. Ibid.
11. Brenda Hilbrich, SEIU Healthcare Minnesota, personal interview, by Michael Wasser, 14 June 2016.
12. Liz Skidmore, NERCC, personal interview, by Michael Wasser, 18 Feb. 2016.
13. Karen Hoerst, SEIU, personal interview, by Michael Wasser, 8 Jan. 2016.
14. Clark, 2009, p. 58
15. Renfroe interview.
16. Ibid.
17. Welcome Packet, IUE-CWA, on record with Jobs With Justice and available upon request to [research@jwj.org](mailto:research@jwj.org).
18. Gretchen Dziadosz, Michigan Education Association, personal interview, by Michael Wasser, 8 June 2016.
19. Clark, 2009, p. 63
20. Muhammed presentation at JWJ conference
21. Murray, P. (2013, Fall). *The Secret of Scale*. Stanford Social Innovation Review. Retrieved from: [http://ssir.org/articles/entry/the\\_secret\\_of\\_scale](http://ssir.org/articles/entry/the_secret_of_scale).
22. Clark, presentation at JWJ conference.
23. Robert Weitzel, RNA of UCMC, personal interview, by Michael Wasser, 9 Feb. 2016.
24. AFL-CIO, *Words That Work for Internal Organizing, Words That Work for External Organizing* (2016). Washington, DC: AFL-CIO.
25. Renfroe interview.
26. Non-Member Informed Consent Form, Michigan Education Association, on record with Jobs With Justice and available upon request to [research@jwj.org](mailto:research@jwj.org).
27. Dziadosz, interview.
28. Clark, 2009.
29. Kim Catania, OSUNO, personal interview, by Michael Wasser, 27 Jan. 2016.
30. Shelton interview.
31. Renfroe interview.
32. Welcome Packet, SMART Transportation Division, on record with Jobs With Justice and available upon request to [research@jwj.org](mailto:research@jwj.org).
33. Welcome Packet, IUE-CWA, on record with Jobs With Justice and available upon request to [research@jwj.org](mailto:research@jwj.org).
34. Clark, 2009.
35. Renfroe interview.
36. Ibid.
37. Clark et al, 1993
38. Renfroe interview.
39. Welcome Packet, IATSE, on record with Jobs With Justice and available upon request to [research@jwj.org](mailto:research@jwj.org).
40. Geoff Betts, Writers Guild of America East, personal interview, by Michael Wasser, 17 February 2016.
41. Author observation of RNA new member orientation, 9 Feb. 2016.
42. Bernadine Robbins, SAG-AFTRA NYC, personal interview, by Michael Wasser, 17 February 2016.
43. Clark, 2009, p. 62
44. Hilbrich interview.
45. Clark, 2009
46. Ibid. 64.
47. Ibid.
48. Catania interview; Weitzel interview.
49. Robbins interview.
50. Betts interview.
51. Tom Miller, Actors' Equity, personal interview, by Michael Wasser, 8 Mar. 2016.
52. Skidmore interview.
53. Renfroe interview.
54. Ben Speight, IBT Local 728, personal interview, by Michael Wasser, 10 Feb. 2016.
55. Weitzel interview.
56. Renfroe interview.
57. Miller Interview.
58. Renfroe interview.
59. Speight interview.





# APPENDICES

## Sample Contract Language

A union can and should negotiate for the right to meet with new hires as part of the employer's orientation, which is typically mandatory, on the clock, and scheduled during new employees' first few days on the job. This provides unions with the means to interact with every new employee in person. Participation in an employer's new hire orientation can also validate the union's role in the workplace, giving it legitimacy in the eyes of new hires.

Here is sample bargaining language that unions can use to ensure they can participate in an employer's orientation:

"[Employer] will provide a sixty (60) minute period of time during the first week of employment for bargaining unit members for the [union] designee to meet with the newly hired bargaining unit members to discuss the parties' rights and obligations under the collective bargaining agreement. The meeting shall be held during normal working hours in a meeting room provided by the employer. Such meeting will be on paid time for the employees and attendance will be mandatory. Prior to the orientation meeting, or in no case later than the meeting time, the employer will provide to the union the names and job assignments of the new hires."

## Sample Participation Form

[Union Logo]

As a union of working people, we know that joining together is how we can bring change and make improvements in our communities. We also know the experience of doing so is rewarding and fun! There are many ways to get involved, and we hope you will join us.

Please let us know what activities interest you. We'll be in touch to let you know how to get involved.

- Civil rights and equality \_\_\_\_\_
- Community service \_\_\_\_\_
- Community-based campaigns \_\_\_\_\_
- Education \_\_\_\_\_
- Health and safety \_\_\_\_\_
- Organizing \_\_\_\_\_
- Politics/legislative \_\_\_\_\_
- Recreation/outdoors/sports \_\_\_\_\_
- Union leadership \_\_\_\_\_
- Veterans' issues \_\_\_\_\_
- Women's issues \_\_\_\_\_
- Other issues I'd like to see the union engage in \_\_\_\_\_

Name: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Email Address: \_\_\_\_\_

## Sample New Member Orientation Follow-Up Checklist

| NEW HIRE NAME | ORIENTATION COMPLETED (DATE) | Orientation Facilitator | SIGNED CARD? (DATE) | ADD TO DISTRIBUTION LIST (DATE) | WELCOME LETTER SENT (DATE) | Follow-Up Assigned To | FIRST FOLLOW-UP COMPLETED (DATE) | SECOND FOLLOW-UP COMPLETED (DATE) |
|---------------|------------------------------|-------------------------|---------------------|---------------------------------|----------------------------|-----------------------|----------------------------------|-----------------------------------|
| Adam Jones    | 07/19/16                     | BH                      | Y (07/19/16)        | Y (07/20/16)                    | Y (07/20/16)               | KB                    | Y (07/22/16)                     | N                                 |
|               |                              |                         |                     |                                 |                            |                       |                                  |                                   |
|               |                              |                         |                     |                                 |                            |                       |                                  |                                   |
|               |                              |                         |                     |                                 |                            |                       |                                  |                                   |
|               |                              |                         |                     |                                 |                            |                       |                                  |                                   |

- ✓ Welcome letter: Send via email or postal mail within 24 hours of orientation completion date.
- ✓ Add to distribution list: Add new hires' email and physical addresses to the union's distribution lists within 24 hours of orientation completion date.
- ✓ First follow-up: Engage via phone or in-person conversation within 72 hours of orientation completion date.
- ✓ Second follow-up: Engage via phone, in-person conversation, or written correspondence 3 to 5 weeks after orientation completion date.

## ACKNOWLEDGMENTS

This guide draws heavily from the research of Paul Clark. Readers are encouraged to purchase a copy of his important book, *Building More Effective Unions*, 2nd edition (Ithaca, NY: ILR Press, 2009).

Jobs With Justice Education Fund would like to thank Union Privilege for its financial support of this project. In particular, we acknowledge Beth Shannon and her team. We are grateful to AFSCME's Paul Booth for his championing of this research. This report would not be possible without the support, advice, and help of the following individuals: Paul Almeida, Paul Clark, Matt Mayers, and Kelly Trautner.

For more information about this report, contact **Jobs With Justice Education Fund**

research@jwj.org  
www.jwj.org





**PRAISE FOR THE FIRST EDITION OF MAKING  
THE CASE FOR UNION MEMBERSHIP:  
THE STRATEGIC VALUE OF NEW HIRE ORIENTATIONS**

**“An effective new hire orientation program is a crucial organizing tool for unions of professionals. We have integrated this important report into the resources we provide DPE affiliates.”**

— Paul E. Almeida, President, Department for Professional Employees, AFL-CIO

**“The International Alliance of Theatrical Stage Employees (IATSE) is the union representing the behind-the-scenes workers in the entertainment industry. In these challenging times, we continue to grow and get stronger through enhanced activism, communications, skills and safety training, and education for local leaders. Strategies for growth and strength must be based on critical research and data, and this report offers local unions strong ideas and steps to adopt. We have shared the best practices in this report with all of our local unions as an essential resource for working people standing together to build strong local unions and engage workers.”**

— Matthew D. Loeb, President, International Alliance of Theatrical Stage Employees

**“A structured program that includes a new employee orientation with representatives of the union is a key to successful organizing. The research and reports compiled by Jobs With Justice include useful data and reveal best practices that can help all unions improve their organizing efforts.”**

— Brian Renfroe, Executive Vice President, National Association of Letter Carriers

**“CWA has used this timely and important report as the basis for local trainings on how to conduct new hire orientations. As the report notes, the first interaction new workers have with the local union is critical, and can make a lasting impression -- leading to more committed and involved members.”**

— Sandy Rusher, Organizing Director, Communications Workers of America

**“A vibrant and relevant labor movement depends upon the active engagement of its members. Building an effective new hire orientation program is a key step in strengthening unions, which is why we’ve made this report a must-read for our affiliates.”**

— Angie Wei, Chief of Staff, California Labor Federation