

## Welcome to Organizing 120

This course should take you about one hour to complete.

It is one of the required courses for the certificate of completion in the Organizing track.

The prerequisite for this course is Organizing 100.

The sections of this course are:

- Why We Map and Chart

- Creating and Using Maps and Charts

- Build a Worksite Network

- Activity: Creating a Worksite Map

### Section One: Why We Map and Chart

Sun Tzu (an ancient Chinese military general, strategist and philosopher from the 5th century BC) said, “If you know others and know yourself, you will not be imperiled in 100 battles; if you do not know others but know yourself, you will win one and lose one; if you do not know others and do not know yourself you will be imperiled in every single battle.”

*[Overview]*

The understanding of these relationships, the ‘knowing’ of yourself and others, is crucial to network building and, subsequently, effective organizing for both stewards and member leaders.

The terms “map” and “chart” will be used to illustrate the organizing of existing relationships in the worksite.

*[Why do we map and chart?]*

Why do we map and chart? What are the reasons for documenting the locations and relationships at a worksite?

We chart so that we know where members are, to whom they relate and who their leaders are. We use maps to identify areas within our worksites where we need to recruit and train leaders.

Charts help us know, at a glance, where our union is weak and where it is strong.

Charting and mapping can help understand the worksite, the relationships of the people at the worksite and give us some indications about how these relationships can help build the union. Charting and mapping can be very helpful in any plan to organize employees.

It is important to track union information with maps and charts; for many of us, it is helpful to use these visual representations of relationships to better analyze and plan.

You may already use some form of maps or charts to keep track of members at your worksite. If so, you may understand the strength that these visual guides can provide for organizing all types of campaigns.

### *[The Differences]*

How is a chart different from a map?

A chart is a grid that organizes work information - charting at the worksite captures who and where everyone's work assignment is according to management's existing organization.

A map is a visual representation of *social* networks at the worksite. Mapping captures who hangs out together or who has influence in the groups. Mapping follows the natural social grouping that is created by the people themselves.

Take a moment to think about the charts and maps you use in your work - does one in particular come to mind? Each of us uses charts or maps in some way - and most of us find that this visual depiction of our work can help by reminding us of how things fit together.

### *[Chart Example]*

This chart might remind you of one that you use frequently. It is a calendar for scheduling conference rooms. It clearly represents what is happening in each meeting room throughout the day.

### *[What belongs on a chart?]*

A chart uses a grid to capture, organize, and track information. Some examples of information that can be tracked on a chart are - who works where in a given facility, what shift do they work, what is their job classification and seniority status. Also include who they work with, and who are the leaders.

Their employment status - whether they are temporary, part-time, or on-call, is helpful to chart, along with some indication of what kinds of skills they have.

It is helpful to have some way to indicate on your chart the membership status and level of activity in Local 1000 such as attendance at trainings, involvement in actions, petitions signed, COPE contribution, or other participation. Their contact information is always useful, along with their level of support.

Now, you probably wouldn't need or want all of this information on every chart all of the time, but it is easy to imagine how any of it could be useful in different situations.

### *[Visual Representation - Chart]*

Here is a simple chart that lists shifts, and another one listing people who have participated in union activities.

You could start with this kind of chart and add to it as you get more information about your co-workers.

### *[Example - Chart]*

Let's think about one example of a specific task where a chart of relationships can be useful...

In this example, Local 1000 has given you the task of distributing a leaflet to the

State Controller's office employees about upcoming elections. You are new to that office, and you need to get the leaflet out within 24 hours.

Where do you start?

If you have a chart of the controller's office, it will give you names of members who would help pass out the leaflets.

From this list you can also figure out which areas will be hard to reach.

However, you can't tell who works close together and who they might know in *other* work areas. What is missing here is the social piece - this is where mapping begins.

*[What Belongs on a Map?]*

Here is an example of a visual map of a worksite. This worksite map on the left is an actual map that shows the locations of individuals on a single floor of one building.

We will use the simpler version on the right for our example.

Start with a basic map of the work area showing the location of each person and their name.

Then add color to the map to indicate union members. Color will give you information at a glance.

In this building there is a group of employees who take walks together. There are usually social groups at any worksite that may or may not include a walking group.

On our sample map let's add a 'W' symbol to identify the members of this social group.

You can now begin to see some patterns of connection between employees that will be helpful as you plan your leaflet distribution.

As you develop your map, you may discover that folks from other floors or other departments belong to the same social group. You can add them in a list in an empty space on the map. Our walking group has 3 people from the 2<sup>nd</sup> floor, and four more who work in payroll.

It looks like this social group would be a good network to link into if you have information to distribute or if you are looking for new members or volunteers.

What other kinds of information can you capture with social maps?

- Membership in carpools, book clubs, church groups and other organizations
- Social clubs or other groups based on ethnicity, age or job classification
- What other groups can you think of to add to this list?

When you layer this information with shifts worked, job classification and project committees from charts you can have a complex, and very powerful understanding of connections.

Identifying these groups will help you get to know and communicate with members and potential members...

## Section One Review

### Maps and Charts

- a) *Organize existing relationships in the worksite*
- b) Must be updated monthly
- c) Should be created by union staff
- d) Are a waste of time

The answer is A - Maps and charts organize existing relationships in the worksite - information such as where each person is located, what job they do, how they relate to the rest of the department and the other employees.

A chart is...

- a) Locations of departments
- b) A list of job classifications
- c) *A grid that organizes work information*
- d) A document that lists SEIU Local 1000 offices

The answer is C - A chart is a grid that organizes work information, such as all employees of a certain job classification, or employees working on a specific floor.

A map is...

- a) *A visual representation of social networks*
- b) Only found on Google
- c) Grid of office furniture locations
- d) The final inventory document for the year

The answer is A - A map is a visual representation of social networks, usually in a typical map format. These networks can be represented by colors and symbols, by a numbering system, or by any other system that makes sense to illustrate how people are organized.

## Section Two: Creating Effective Charts and Maps

### *[Effective Charting]*

Let's look at the basics of effective charting - How do you create a chart that will work for you?

Start by breaking down your workplace by work area. What is a work area? It's the natural grouping of people who are in regular contact with one another in the workplace. A group of analysts is not a work area.

The group of employees located on the 3rd floor does define a work area.

Next, divide the employees by work area and identify things you want to track, such as the leaders, the non-members, and anyone who has volunteered in the

past.

How you define these categories is something to discuss with other stewards or field organizers.

Code them by number, color, or symbol to make your chart easy to read and to make each kind of group easy to recognize.

Write your categories down on a large chart for display or on letter size paper for carrying around with you.

Charts are fluid documents, and they are only useful if they are accurate. The process of filling them out can involve locating people who might be new members, or removing people who have left, have gone on leave, changed work assignment or have ceased being leaders.

To have balanced representation you need one member leader, or steward, per group of 25 members.

A chart can help you assess your progress toward the goal and identify what areas still need work to reach the goal.

Use the “SCIF Worksite Charting” SkillBriefs to help chart activists and leaders at your worksite.

Here is an example of a very basic chart. It includes simply the name, department and classification of each employee along with the shift worked, a contact phone number and two union activities members were asked to participate in.

If you color-code the responses, for example green for yes and red for no, you can see at a glance who has a history of helping out

### Sample Chart

| Name        | Dept. | Classification | Shift | Phone    | 4/13 Rally              | March on Boss |
|-------------|-------|----------------|-------|----------|-------------------------|---------------|
| Lee Johnson | DOE   | Secretary 1    | 1     | 555-5555 | Maybe                   | Who knows     |
| Tracey Ong  | DOE   | Clerk 3        | 1     | 555-6666 | Will bring 3 co-workers | Will come     |
| Terry McKee | EDD   | EPR1           | 2     | 555-7777 | Will come               | No            |

#### *[Tips for using charts]*

You can make your charts more useful as you make them fit your needs. You can also integrate them with your contact list if you use

Excel or another spreadsheet, then you can coordinate your lists with your charts and you will only need to enter the information once.

We have talked about color coding to make charts and maps easy to read. When you enter information into your chart, the most important information should be listed first. Later, you can re-sort your chart lists in other ways.

Use your chart with workers and with leaders to keep people organized in your head and easily create collaborative groups.

Keep your maps and charts updated between campaigns. Making changes as

people move around is much easier than recreating the document from scratch.

### *[Effective Mapping]*

Knowledge is power - or at least the beginning of power. Mapping your workplace will give you a picture of where the union is strong and where it's not. You can then build on those strengths to develop more power. Make good use of colors and symbols...even different types of lines...to group people and to indicate relationships - both work and casual.

Also make use of this grouping system to compare and connect groups of employees and leaders as they interact across the worksite. You will learn how people are already organized, both formally and informally, and how communication takes place. A strategic workplace leader can tap into these existing structures and develop union strength.

Your workplace map will tell you how to find and use the natural leaders who already exist, and connect with the people who interact with most of the employees. It can even help you understand how management is organized.

If the workplace is a large facility, you may want to begin by mapping just your department or shift. You can then work with other worksite leaders to piece together a map of the entire workplace.

### *[Create Your Map]*

Begin by drawing an outline of your department. Add in workstations, desks, machines, and other pieces of the floor plan. If appropriate, you can chart the flow of production by using a broken line. Place a circle where every employee is usually stationed and write in their names. Identify who are activists, non-activists, and anti-union employees. If mobility is an issue, identify those employees who can or cannot move around.

If you are aware of loners or people who don't mix with any group, indicate that by using some special mark or color. Also, identify the weak links: the company yes-person, part-time employee, or any new hires.

Identify and circle social groups - that is, employees who work face-to-face with each other every day. Employees in a social group have an opportunity to communicate with each other while working and, perhaps, spend time together on breaks or at lunch. Mark the influential people or informal work group leaders. Sometimes they are stewards, though often they may not be.

On your map, indicate locations where management and/or employees are usually stationed. Mark those who are leaders. Mark other locations where employees tend to gather - break areas, lunchrooms, bathrooms, water fountains - and identify who gathers with whom in these places. Identify the leaders in these groups.

Mapping your workplace - and keeping it updated - is a long-term, ongoing process.

Here is our completed map. It is easy to read and will be helpful when we are looking for help or recruiting new members.

### *[What your map shows]*

Your map may show you how worksite connections flow and it may also show you

how the workplace is set up to keep people apart - this alone is a good reason for map-making. But the real reason for mapping is to develop more unity and power in the workplace.

*[How does this help?]*

How does all this information gathering, charting, mapping and organizing help?

Data like this can help identify informal leaders - an important and often an untapped union resource. Current leaders should be targeting these potential leaders for development.

This information will help the steward and the union organize for actions - if you know where people are throughout the day, you can communicate more quickly using this grapevine. This in turn will build support within the worksite, or move messages further and more quickly across departments. People will be more inspired to lend a hand because the message comes from a trusted group leader and other members of their group will also be involved.

Stewards can track skills and experience of co-workers. This record will help stewards to more effectively recruit new members, volunteers, and support. After documenting this information you can easily revisit it and refresh your memory when it becomes time to begin an action or when planning for the future.

The understanding of connections gives leaders a way to read the positive and negative dynamics in a worksite in terms of union strength. It enables leaders to answer questions like, *“Why isn’t the steward connected to any of these informal groups,” “Why does the most popular person have no job in the union,”* and *“Where does the supervisor have influence.”*

Mapped and charted information can also give a picture of management’s strengths and tactics - information which will be useful in planning strong, effective strategies.

Knowing how members interact with each other will actually strengthen the relationships you have with them and relationships they have with each other. As a result, you will build a stronger sense of community in the workplace.

## **Section 2 Review**

Charts are useful only if they are:

- a) Colorful
- b) Part of a worksite plan
- c) *Updated and accurate*
- d) Easy to find

The best answer is C - Charts can be useful if they are colorful and helpful if they are part of the worksite plan. Certainly if you can’t find them they will be useless. However, if they are accurate you will know that you can rely on them to support your work and get the job done.

Which of these is NOT a good way to map a large department?

- a) *Use index cards*
- b) Map your shift
- c) Work with other worksite leaders
- d) Piece together a complete map

The answer is A - Using index cards would be a very clumsy way to map a large department. Instead, choose to map just your shift. Work with other leaders to come up with a complete map of all employees

To have balanced representation, which of these do you need?

- a) One member leader per department
- b) One member leader per building
- c) One member leader per group of 25 members
- d) One member leader per group of 100 members

The answer is C - To have balanced representation you need one member leader, or steward, per group of 25 members. A chart can help you assess your progress toward the goal and identify what areas still need work to reach the goal.

### **Section 3: Building a Worksite Network**

*[Overview]*

No one chart can capture all of the information we need. Only a variety of charts and maps will help us make the most informed decisions.

But charts can only capture numbers - our job is to combine the numbers with the workplace and social maps to understand and use the data.

Then we can make the best, most informed decisions on how to move our union-building goals forward successfully.

*[How can this information help us plan more effectively?]*

With this kind of simple, clear representation of workplace relationships it is much easier to identify leaders - for instance, you can tell who *organizes* the night out and who is in the group that *attends* the night out.

You can more easily organize for actions, build support, or move a message if you know the go-to people who will effectively lead the activities.

Each activity needs specific tasks accomplished, and you have, in this kind of chart, a way to track skills and experience to recruit more effectively for the tasks.

Other uses for your charts and maps include rapid access to documentation of who has participated - the charts and maps will help jog your memory for all sorts of details, help to strengthen relationships between and among co-workers and help to establish a greater sense of community across the workplace.

*[Mastery - Interpretation - Application]*

Here is a chart that shows one way to understand your charts and maps - MIA, or mastery, interpretation and application...

|   |                |  |
|---|----------------|--|
| M | MASTERY        | Understand what the numbers mean and make sure that you are comparing apples to apples and oranges to oranges.   |
| I | INTERPRETATION | Interpret your numbers.<br>What do they indicate about where you are strong and where you are weak?<br>What is your analysis of the numbers?<br>What is the story telling you? |
| A | APPLICATION    | Apply what you have just analyzed to come up with a plan of action.<br>What are you going to do based on what you now understand?  |

If we don't Master, Interpret and Apply the information by using charts and maps, then employees, members and leaders will be MIA - Missing in our union Actions -

### Section 3 Review

Understanding MIA in charting will:

- a. Help interpret data
- b. Help make a social map
- c. Help stewards find missing members
- d. Help members file grievances

The answer is A - MIA stands for Mastery, Interpretation and Application - understanding and interpreting the numbers in order to analyze the data and create a plan of action. The goal of this understanding is to keep employees and leaders involved in Local 1000 actions.

Why should a steward chart their worksite?

- a) *Know where members are*
- b) *Identify potential leaders*
- c) *Identify areas to recruit and train leaders*
- d) *Know where our turf is weak and strong*

All of these choices are correct - a chart will help you know where your members are located, identify who might be a potential leader, identify locations and areas of the office that will be good for recruiting and training leaders, and knowing where there are groupings of supportive employees that will strengthen our turf.

What are the union's categories for charting the worksite?

- a) Numbers, colors and contact information
- b) Shift, floor number and department
- c) Location, email and phone number
- d) *There is no official list of categories*

The answer is D - Charting is an individual tool of an effective steward and has no formally required categories. Categories, structure, and documentation are all up to the person who is doing the charting.

## **Section 4 Activity: Create Your Map**

One way to learn is to practice - so the next step is to begin to create your own workplace map. Use the actual information from your worksite to develop a map and chart system that will really save you time!

Download and print the "Mapping the Worksite" document from the Resource Tab at the bottom of this course, or just get out a blank piece of paper and pencil.

Select an area at your workplace that you would like to better understand - use this area to create your map.

Draw a basic outline of your worksite and use a circle to indicate each employee's workstation, including that of management. Use as many sheets as you need.

Mark the places where people tend to gather on a regular basis.

Use colors to identify people from different workgroups who see each other daily.

Circle the entrances and exits of the building or worksite.

Check with the Building Manager and ask if they have a blueprint of the building. Some have the blueprint that already includes the names of the employees assigned to that cube.

All you have to do now is walk and verify the information is correct. Some have a blank blueprint and you have to walk and write in the names.

Now add the key times to this worksite - that is, the days and times people arrive and get off of work. Add their break and lunch times.

Finally, think about relationship, social groups and communication networks at your worksite, and note them on your growing chart if you already know some of the details.

Make an appointment with your Local 1000 organizer to go over the map and chart you have just created. Add to it, or make changes to help it become a more effective tool for all of you.

Documentation practices such as Charting and Mapping will help keep our focus on our union-building goals.

## **Section 4: Next Steps**

Share the map you just created with another steward or member leader.

Discuss the strengths of this method of documentation and how you each might use charts and maps.

Discuss reasons for charting the worksite - be specific about how it can work for your group.

And discuss who should chart - members are a good choice to help with your charting because they are *at* the worksite and they know the people involved.

## **End of Course**

This completes Organizing 120.

Your next step is to take and pass the Final Exam to complete this course.

Take the other required courses to earn the Certificate of Completion in the Organizing track.