

Building Our SEIU Power:
**Developing an Effective COPE
Organizing Political Program**



SEIU—Wellstone Action

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How to use this manual.

This manual is designed as a resource and reference to be used by political directors and others responsible for developing and running COPE programs on the local level. It is grounded in actual field practice, and the models and approaches discussed here have all been practiced successfully in the field.

The manual is not meant to be read in total, or in one sitting. It is a resource intended to provide a background on the specific components of building a COPE organizing program and to troubleshoot specific issues that might arise in enacting such a program (e.g. creating a worksite communication network, or developing a fund-raising plan, etc.)

We have also designed a series of planning and assessment tools to help focus local capacity building and begin setting strategic organizing goals, including creating an effective COPE fund-raising plan. These tools can be found in the Appendices and are a good place to begin the process of creating a COPE organizing program. Finally, we have indexed the manual in a way to help quickly locate the particular information you are seeking.

The manual is broken into three main sections: (1) Introduction to COPE as Organizing; (2) Organizing and Fund-raising Fundamentals; and (3) Nuts and Bolts of a COPE Organizing Program.

Section I. COPE as Organizing

- **Part 1: Introduction to COPE as Organizing** provides an overview to thinking of and approaching COPE as a way to build capacity and long-term power—i.e. as an organizing program.

Section II. Organizing and Fund-raising Fundamentals

- **Part 2: Strategies for Building an Effective COPE Organizing Program** provides an overview of the fundamentals of organizing conversations (as opposed to mobilizing asks) and how this relates to building a COPE organizing program.
- **Part 3: Fund-raising for Social Change** provides an overview of the fundamentals of effective fund-raising with particular emphasis on fund-raising that builds power.

Section III. Nuts and Bolts of a COPE Organizing Program

- **Part 4: Infrastructure to Support Successful COPE Organizing** provides an overview of the key infrastructure necessary for supporting a successful COPE program.
- **Part 5: COPE “Best Practices” Toolkit** provides a toolbox of best-practices, helpful ideas, and tips for developing and implementing an effective COPE program.
- **Part 6: Legal Considerations** provides the nuts and bolts of what is legally permissible and what is not in developing and implementing your COPE program.
- **Part 7: Training Curriculum on COPE as Organizing** is a three to three and a half-hour modular curriculum for training local union staff, organizers, stewards, MPOs, and other activists who will be responsible for actually implementing the local’s COPE program in the field.
- **Part 8: Appendices: Assessment and Planning Grids and Best Practice Materials** provide several planning and assessment tools along with examples of “best practice” materials that have proven effective in other locals.

How to begin building a COPE Organizing Program

For some locals, this approach of thinking of COPE as organizing may be new. For other locals who already have effective COPE programs, this approach may offer ways to build on their success and further expand the local's capacity to engage its members. In both cases the aim of approaching COPE as a member-to-member organizing program is to involve more members in the work of the union, and in the end secure better contracts, strengthen external organizing opportunities, and build more political power.

Three steps to starting the process:

Step 1 Read the introduction to this manual. It provides a quick overview of what we mean by organizing for COPE and a basic understanding of how this approach differs from some other prevalent approaches.

Step 2 Assess your current COPE program. In the Appendix of this manual are two assessment tools: *Assessment Tool 1: Assessing Your Local Union's Current COPE-Political Program* (Page 85) and *Assessment Tool 2: COPE Political Program Stages of Development* (Page 86). The first grid is designed to facilitate a structured assessment of your current COPE program. It not only looks at the total dollars raised but at a variety of other measures of basic political capacity: the ability to communicate with workers in the workplace, the ability to mobilize members, the ability to track member contacts and volunteer activities, etc. The second grid is used more for setting goals. It sets basic benchmarks for moving toward a power-building local union. Together, these two grids are the place to start building a COPE Organizing Plan.

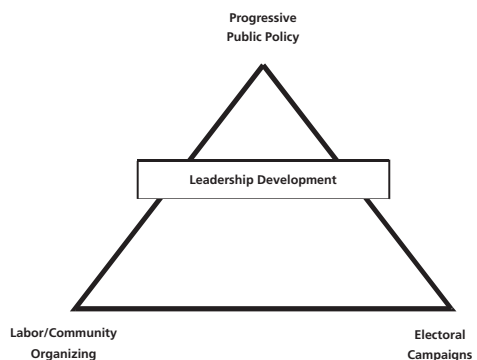
Step 3 Create a COPE Organizing Plan. Once you have assessed your current program and set key goals using the assessment grids, the next step is to create a strategic plan. Using the two planning tools in the Appendix—*Planning a COPE Organizing Political Program* (Pages 89–92) and the *COPE Fund-raising Plan Worksheet* (Pages 95–98) you can begin the process of developing a plan to achieve your goals.

Through this process, the manual is designed to provide further ideas and background material based on best practices.

Building Our SEIU Power:

Developing an Effective COPE Organizing Political Program

Practicing a different type of politics. This COPE Manual was developed by Wellstone Action in collaboration with SEIU. Wellstone Action is a nonpartisan, nonprofit national organization that provides training and leadership development for individuals and organizations committed to building grassroots, progressive political power (www.wellstone.org).



Like SEIU, Wellstone Action teaches a different kind of politics and organizing than traditional electoral politics and conventional wisdom would dictate—a politics that integrates the best practices of labor and community organizing with electoral politics and leadership development to further a bold progressive public policy agenda and build power for the long term.

This manual embraces the approach illustrated by the triangle to the left. Each component of the triangle depends on the other.

Labor and community organizing reach broadly and deeply into our organizations and communities to build relationships and provide tools of empowerment for those otherwise outside of power. This is base building and is at the heart of what an organizing union embodies. But this base needs to be engaged and mobilized to affect change within electoral politics, for elections are a critical arena for contesting for power in our society. Electoral politics is also a world of specific targeted goals, numbers, and urgency—a world where each action has a specific consequence in terms of votes won or lost. The third element of the triangle is public policy. Together, electoral organizing and labor and community organizing build a base, constituency, and opportunity for change, but there also needs to be a direction and vision for how our collective action will make a tangible impact, improve the lives of workers, and make the world a more just and fair place to live. This organizing model for building political power is at the heart of this manual and our approach to building a COPE organizing program.

Acknowledgements. This manual was built under the new COPE/Capacity program initiative. This is the first time a body of work of this kind concerning COPE and Capacity has been created where an approach to COPE as organizing has been at the forefront. This manual will serve as a companion to the wider effort of the COPE/Capacity program to serve as a resource for locals to use for the future.

We drew on many resources and the knowledge of many people—both in terms of providing best practice materials, other written resources, and from their years of experience in the field organizing, building political programs, and raising COPE funds.

We want to acknowledge the folks who have been responsible for helping create this manual and for pioneering this new approach on COPE/Capacity and making the COPE/Capacity program a success.

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Last but not least, thank you to Wellstone Action. The actual drafting of this manual was done by Robyn Steely, a former SEIU local political and communications director, and current Wellstone Action trainer, and Erik Peterson, the director of labor programs for Wellstone Action and the University of Minnesota Labor Education Service.

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I. Introduction

COPE as Organizing

The aim of this manual is to begin to understand COPE fund-raising as not just raising a lot of money (which is very important) but as fund-raising for social change. Such a program will *only* be successful when viewed and enacted as true organizing for long-term, systemic social change and economic justice, as opposed to merely mobilizing for short-term, piecemeal campaigns. A COPE campaign that aims to build real power among workers and for workers is only successful when viewed, enacted and realized through member-based, person-to-person mutual relationship building and leadership development. It must be both strategic and accountable. COPE, at its simplest, is the union's political fund. But if members are to see COPE as *their* political fund, tied to their aims and as a means for achieving their aspirations, then COPE also needs to become a vehicle for members to come together and collectively give expression to their values and interests.

Simply put, we must organize for COPE just as we organize for new members. COPE needs to become central to our organizing union, just as organizing must become central to expanding COPE. Ultimately, if a local union doesn't value and isn't willing to commit its institutional time/resources/energy to raising money for COPE, then it should not be surprised when its members do not voluntarily step forward to contribute their valuable time/resources/energy for the union; and if COPE is viewed and treated as an "add-on," or a burden, or a distraction from the central work and function of union organizing and contract work, there should be little surprise that many members see COPE as an add-on, a burden, or a distraction, too. Ultimately, just as we organize for social change, through COPE we fundraise for social change.

Organizing versus Mobilizing

COPE as a vehicle for building union power through empowering members may require a re-evaluation of how we currently raise COPE dollars, even for those local unions that successfully meet their COPE commitment. What do we mean by this?

Given the time and the ability to call through long, relatively good lists, it is not difficult to build a crowd for a single important event or turn out a vote in a critical election. This involves motivating people to act on what matters to them. These are mobilizing conversations.

Such short-term mobilization does not, however, equate with building power for the long-term, nor is it ultimately sustainable over time. Just because someone shows up at one rally or one phonebank does not mean that she is fully committed to the campaign; it may not even be an accurate demonstration of her interest in a particular issue. Likewise, giving a COPE contribution by itself does not equate with building long-term power.

Effective mobilization over the long term stems from and is built upon the foundation of effective organizing. Effective organizing is built upon deep conversations that reach toward finding a person's issues, interests, values, and capacity—a chance to share stories and build relationships. This is quite different from "delivering a message" or a "giving a rap"—both tools aimed at mobilization. But effective organizers also know they must find common ground as the basis for securing a commitment to act. Ultimately, both organizing and mobilizing are necessary for building power.

This approach of seeing effective organizing as a foundation of effective fund-raising is a different approach than is often taken. Intuitively, such an approach makes sense. After all, who do we donate money to: people and organizations that we know and trust, or strangers and organizations that cold call or knock on our door?

Recognizing this basic point makes fund-raising based on organizing more effective, less scary (you're asking people you already know), and builds union power, not just raises political money.

This last point is critical. Odds are if you ask a whole lot of people to give to COPE with a generic rap, you will end up with some contributors. This is what telemarketers do. But such fund-raising is shallow, based on volume, and on the quantity of contacts rather than the quality of contacts. You may raise a few dollars; you may even raise a lot, but you won't build a cadre of contributors and activists who are deeply committed to the union's program, nor will they be able to articulate why they are giving and move others to join them. You won't be organizing and you won't be building long-term political power. Practically, it is also *by* creating this cadre of activists that our work becomes easier and our goals more manageable.

Getting Members Involved

It is so simple that it is often taken for granted: Giving one's time, skills, and money to the union are voluntary.

Most current members experience the union as another job requirement: most workers apply for a job as a state worker, or in a nursing home, or as a school bus driver only to learn later that with their employment comes union membership and union dues. Most have no prior experience of union membership, and for most their first experience with any union is learning that they now "have to" pay union dues. Most do not understand that their wages, benefits, and working conditions were won because of fellow union members' commitment and struggles, and their union dues ensure the continuation and strengthening of these victories for future workers.

On the other hand, union members who contribute to COPE and who participate in external organizing, serve as stewards or on the negotiating team, or work on electoral campaigns are volunteers. When we ask for this voluntary commitment from members we are asking them to make real, substantive and sometimes very difficult choices about giving or not giving significantly to their union what they might otherwise give to their families, friends, communities, churches and temples, hobbies and all of the other pressing demands of full lives.

Put in another way: People only volunteer for those things that matter more to them than all of the other ways they can spend their time/money/skills on a weekend, evening or day off. Filling shifts for GOTV phonebanks, participating in a lobby day, signing union organizing petitions and contributing to COPE are all exchanges between a member who has goals and aspirations (both personal and for her/his family and community) and the union which s/he now sees as a means for helping attain those goals and meet those aspirations.

We know that it is the rare member, the rare person, who seeks out these activities and volunteers on her own. The vast majority of members volunteer because they are asked or because they see value in the act of collectively taking political action. They say "yes" because they come to understand that their individual act of volunteering or contributing meets and addresses their own interests and values, and just like other actions that build the union—marches, rallies, contract and organizing campaigns, and lobby days. Similarly, their COPE contribution becomes a public, unionwide expression of shared values, commitment and power. This is especially true when COPE funds are raised member to member.

Organizing for Power

The aim of getting members involved by contributing to COPE, volunteering for a phonebank or doorknock, or serving as a steward or bargaining committee member is to make our unions stronger and the lives of our members (and all workers) better. Organizing for COPE should not be seen as a distraction from other everyday activities of the union (negotiating and servicing contracts, organizing new members).

For example, the same communication structures and the relationships built around a contract campaign makes it easier to raise COPE dollars. Likewise, the communication structures and relationships built during electoral work or COPE fund-raising help identify worksite leaders and make it easier to mobilize members for contract campaigns, worksite actions, or rallies.

It all boils down to building our union power by going deeper into our locals and engaging members and developing new members.

The rest of this manual offers concrete ways to build this union capacity, raise COPE dollars, and expand our union power.

III. Strategies for Building an Effective COPE Organizing Program

Fundamentals of Organizing and Building Relationships

Face-to-face conversation is key to effective COPE fund-raising.

Conversations are the means through which we identify and assess members and *ideally* move them to action. Conversations are about building relationships with members and co-workers about what matters to them. This is very different from a scripted rap; organizing is about engaging in a dialogue with a member—a real conversation with the intent to learn more about the person.

Getting a person's story.

Organizing conversations are 1) conversations with a goal, and 2) they are intentional. They are about building intentional relationships with a purpose: to find out a person's story. A person's story can be seen in the broadest sense here, including the member's overall worldview, but it is also more practical, learning a person's most important issues, interests, and values and assessing their capacity and commitment.

Identifying a person's issues, values, interests.

Through these conversations, we are trying to find common ground by understanding a person's:

- **Issues**—what they work on or think about, such as good pensions or immigration reform or a bad supervisor.
- **Values**—what motivates them, motivates them deeply, such as a sense of justice and fairness or religious values.
- **Interests**—what is at stake for them, why it matters, such as needing affordable health care for his family or the families of his co-workers.

If we are talking about an issue the member has no interest in, s/he will not connect to the issue and ultimately the ask no matter how important the *organizer* thinks the issue is. If the member is interested in an issue, no matter how insignificant, it will connect. The object is to find that connection. Through education and conversations, most people will understand that their issue is tied to bigger issues—those of their community, their municipality, the nation, even internationally. But organizers always have to start where people are and build the relationship and the connection with larger issues or in the campaign before assuming that everyone is concerned about the issues we are concerned about and think they should be concerned about.

Assessing a person's capacity and commitment.

When the member's issues, values and interests are identified (through one, or more likely, multiple conversations and interactions), then the person initiating the conversation can move to assess the member's:

- **Capacity**—what s/he can offer (money, time, access to her community group) and how much s/he can offer (two hours a month/\$5 a month/a call to her community group's leader).
- **Commitment**—what s/he is willing to offer or commit. Commitment is connected to the level of interest that the person sees being met by their action—the deeper the connection the more likely the person will commit more of their time, money, or other talents. For example, a home health care worker is likely to see a direct connection between the legislature passing a bill that raises home health care worker wages and COPE, than a janitor who does not see the connection between her interest and that particular issue.

To make the connection with this member, a different approach based on an understanding of her issues, interests, and values will likely be needed.

Organizing conversations are primarily about building relationships and getting information in order to try to find a common purpose or common ground. It is upon this common ground that effective mobilization can then occur—where the person makes a commitment because s/he sees his/her interests/issues/values reflected in the campaign (COPE).

Making an “ask” around common concerns.

Too often we ask for a commitment of time or money before we get to know what matters to the person, and then are frustrated by his/her response. Organizing conversations provide the information and the relationship that makes it much more likely to find common ground and for the person to say “yes.”

We structure our “ask” around this common ground. To be most effective—and to build power, to empower—the ask is personal, not scripted. Otherwise it is like a telemarketing call. This is why a “rap” won’t cut it. If the COPE rap is about Social Security or health care for kids and the member truly cares about her shift differential or being able to afford to go back to school, the rap will ring hollow and will not address her interests and will sound like being talked at rather than being part of a mutual conversation. This is especially true if s/he doesn’t yet understand a bigger picture—how the rising cost of health care eats into higher education funding and how those two issues are linked.

Again, we find this common ground by having real conversations with members and building a relationship of trust over time. Ultimately, successful fund-raising, just like successful organizing, occurs when people feel that their interests are reflected in the campaign and tied with its success and then they take action based on that belief.

In other words, a member will sign up for COPE when s/he believes her/his interests are reflected in the union’s political program and that contribution is tied to its success.

Fundamentals of a COPE Organizing Program

Building relationships are core to COPE fund-raising.

The most effective fund-raising ask, like the most effective organizing or electoral ask, is always the most personal. Specifically, the solicitor (the one asking for COPE—the organizer or the fellow member) is known to the person being asked. Think of how many times you have contributed to a school candy bar sale or to a walk-a-thon or bought a T-shirt based on *who* asked you more than on what is being asked, or simply because you trust the person when they tell you their cause is a good cause. In terms of COPE, the best person to make the ask is a co-worker and the next best is the member’s organizer. The most effective ask—always—is one done face to face. Sometimes this is not possible or very difficult (e.g. single member worksites or home health care workers spread out over a large area). Other strategies need to be developed to make relationship-building part of the union culture (e.g. events, rallies, recognition parties, contract ratifications, etc.)

Repeat contacts—multiple venues—multiple styles/modes.

It is the exceptionally rare occasion in which a COPE contribution would be solicited at the first meeting or during the first conversation. Why? Because on first meeting, the person asking for COPE will not know the person’s issues, ability to give, shared values. Again, this is not strange. How many of us contribute \$100 to a telemarketer or door-to-door canvasser from an organization that we previously knew little or nothing about?

There are always exceptions to this general rule: new members who sign up for COPE when they are signing up to be a member; members who come to the union as independently political activists, etc.

In a good organizing campaign, we look for opportunities to have repeated contacts. Similarly, COPE does not work as a stand-alone campaign. The likelihood of success of the COPE Ask in the short term and as a long-term strategy to build the union is increased by integrating COPE into all aspects of the union: bargaining, organizing, worksite and other union issues.

Layering Conversations/Contacts.

As in GOTV campaigns, no one knows which of the seven contacts is the tipping point in a person making the decision to act. This is why in an election campaign we tend to do as many different contacts as possible. The worker, the voter, the member needs all of these contacts, layered. Yet ultimately, it's genuine conversation that is at the heart of "securing the deal." Fliers, posters, announcements, newsletters, COPE cards are all tools for contact. They create a buzz (or the popular phrase now is an "echo") and create a context for, but are not the substitute for, the person-to-person values-based conversation and ask.

Integrating organizing, bargaining, and politics.

Most members are initially and primarily interested in their wages and benefits—their contract. If members don't feel they have the ability to address these things adequately through their union, they will likely be resentful or even hostile to a COPE-only pitch.

Therefore, COPE needs to be integrated fully into all aspects of the union: the organizing work of the union, bargaining, and electoral and legislative campaigns. A future COPE contribution may begin with a thorough understanding and conversation about a workplace issue, linked to a contract fight, connected with a legislative initiative, and brought back to the importance of COPE.

Example. Two members at the same worksite doing the same job in the same community may come to be COPE contributors for very different reasons. For example, one who is an immigrant and a mother may care most about the work the union is doing to ensure that her children have access to affordable higher education. Another member who works alongside her may be more interested in how the union can enlist the support of politicians to support their contract campaign and help them fight for living wages. Their specific issues may be different, but in this example, they both share the value of and commitment to working on collective solutions.

The organizer (whether staff or member) identifies the members' issues through conversations and talks with them about how union members are coming together to organize around these issues. The first member might be invited to give testimony at a legislative hearing about education funding; the other member may be invited to help make visits to politicians to ask for their support on their contract. Through conversations and actions and follow up, both could be asked to give to COPE, as a part of the long-term work of adequately funding education and increasing living wage jobs.

Fundamentals of COPE Conversations

Questions that can spark good conversations.

So how do we build relationships that turn into foundations for meaningful and successful COPE asks? Through the model of all good organizing: we initiate and engage in conversations that ask multiple, substantive, responsive (not canned) questions with thoughtful listening and respectful response to member's answers.

Below are a few types of questions that can lead to identification issues, interests, values, capacity and commitment:

- Where are you from?
- How did you get into this work?
- Do you have kids? Family?

- What issues are you dealing with at your worksite?
- What is the most important thing to you in your contract?
- How long have you worked here?
- Where did you work before you had this job?
- Why did you want a job at this worksite?
- What do you want to do when you retire?
- Do you think this hospital/agency/company is well run?
- Do you like working here?
- What are the big worksite issues you and your co-workers talk about the most?
- What do you do on the weekends/after work/before your shift?
- How have things changed since you started your job? For better or worse? Why?
- If you could change one thing to make your job/life easier, what would it be?
- Do you think things are going in the right direction in this country/state?
- What do you think of politics? Politicians? Why? What experiences have you had that make you think that way (for good or bad)?

Organizing conversations are about asking questions, listening to the answer, and oftentimes probing deeper and asking follow-up questions to learn more about who the person is, what matters to them, and assess what their capacity and commitment might be. And depending on their answers, the questions can lead to ones that are more directed, such as, “Have you heard about the minimum wage/overtime/pension/worker safety law they’re trying to pass/we’re fighting for?” Or, they may lead to a discussion of upcoming contract negotiations, which *may* or *may not* include a discussion about COPE—yet.

Clearly, conversations with different members will be very different and cannot be scripted. The initial questions may be the same, but the member’s interests, family situation, etc. will necessarily lead the organizer/fellow member to different follow-up questions, responses and perhaps, if appropriate, different COPE asks.

Example. During one worksite visit, an organizer might talk to:

- A 22-year-old member without kids who doesn’t plan to stay at his current job particularly long, who is very involved in his church and community sports teams, who isn’t really sure why he belongs to a union.
- A 46-year-old member who is a single mom and who is attending night school, eager to become an RN to have a greater role in patient care and to earn better wages to support her family.
- A 52-year-old member with an ill partner/spouse and a grandchild to care for at home. He is most interested in earning the highest wages possible and having ample free time to spend with his family.
- A 59-year-old member, who has been at that job for 30 years, is eager to retire but worries about the adequacy of her pension and health care when she retires. She has served as a union steward for many years.

Each of these conversations will be different and will likely result in a different “ask.”

Will there be similarities in conversations? Of course, because members will all be working at the same place, or share the same union contract, work in the same community and perhaps they even share some of the same values, such as the importance of family and working hard. Yet their interests and issues are likely unique to each of them. They may all eventually give to COPE, but a generic canned rap won’t work with them.

Not all conversations should include “The Ask.”

Conversations must include many questions, but they don’t all necessarily include *The Ask*. (More specifics about making *The Ask* can be found in the “Nuts and Bolts” section.) For example, the organizer/fellow member may begin a conversation with a member with the goal of asking her/him to participate in a canvass or sign up for COPE. That’s a fine and practical initial goal. However, the conversation and the person’s answers to the organizer’s questions might well lead in a different direction and result in the organizer/fellow member not making a COPE ask on this first visit.

Example. An organizer learns that the member works weekends and isn’t available for a canvass or the member is very interested in becoming a shop steward and much less interested in politics for right now, or the person has never heard about COPE and needs more information that would allow the second or third conversation to better set up *The Ask*. In the case of the person interested in being the steward, s/he should have the opportunity to learn more about COPE during the local’s steward training. For the person who needs more information, provide it, then make sure that a time is set up to follow up if there are any questions. Perhaps the follow-up conversation will be a more appropriate (and successful) time to ask for a contribution.

Strategies for COPE conversations

What do you do when people say “no”?

Even the most thoughtful and compelling asks do not always result in a “Yes.” This is OK. An initial “No” or reluctance doesn’t necessarily mean that there is a lack of interest, shared values, or even commitment. It might mean the person is not yet ready, is not in a position personally to give of his/her time or money, would like to talk to her/his spouse or partner before making a contribution, or that s/he doesn’t completely understand what is being asked. Or it might be something else entirely. That is why the conversation—and the relationship—must continue. A “No” to your COPE ask does not mean a “No” to being a steward or to circulating a petition or to attending a rally. It doesn’t even mean “No” to COPE forever. All of these other actions will make it more likely for the person to eventually give to COPE as well, and it makes for a stronger, more effective union.

Persistence and repetition pay off. Any organization, campaign or candidate that organizes or fund-raises successfully knows that multiple contacts are required to secure commitments: votes, money, and time from individuals. In an electoral campaign, it may be a combination of door-to-door, phones, mail, yard signs and TV ads. In an external organizing campaign, it may be meetings, petitions, fliers, buttons, house visits, and rallies. In fund-raising, it is layering multiple contacts through multiple contexts.

The more personal the contact = the more effective the ask.

There are many tools for contacting members as described above. A key rule for COPE fund-raising, just as for all field organizing, is: The more personal the contact = the more effective the contact = the more resources required. This doesn’t mean that you don’t use all the tools—that is why it is called a toolbox, but it is equally important to know exactly why you are using the tool, and what you will likely get out of it.

Tools include conversations and potentially COPE asks in the following contexts:

- General membership meetings
- Stewards meetings
- Worksite meetings
- Contract ratifications
- Worksite one-on-ones
- Fliers on worksite bulletin boards

- Articles about COPE contributors in a newsletter
- Political announcements on the Web site
- Direct mail
- Phone calls

These tools are a combination of less personal and more personal, and they need to be layered. A newsletter article and mailing may raise awareness of COPE and what it means for a member but rarely will it result in a contribution. A contract campaign that makes the direct connection with politics is likely to help members see the connection between political action and better contracts. These, coupled with a direct, personal ask at the worksite or contract ratification meeting will be much more likely to succeed, particularly if all of the other contacts have been made.

Making it more likely a person says “yes.”

Conversations take time. Layering contacts takes time. Yet, with this work, groundwork is laid for successful asks. With assessments and targeting, the substantial majority of COPE asks will receive a “Yes” in reply. You are, after all, asking someone you already know, have assessed, and with whom you have an existing relationship. Building such relationships takes time, but “cold” asks also take time, drain energy and are frustrating for both the asker and the one being asked because so much has to be explained and no connection or context exists prior to the ask.

Certainly, an individual’s reasons for contributing are personal and often complex. But typically, motivations for giving include a combination of the above bullets, and:

- Being asked by the “right” person
- Being asked at the “right” time
- Being asked a number of times and being exposed to COPE as an integrated part of the union (see more under Changing the Culture)
- Being engaged in ongoing, mutual relationship-building through conversations with his/her union organizer, steward, fellow members

Finally, forcing an ask for money when the time is not appropriate can make it more difficult to make other volunteer asks or to ask for money in the future. In organizing, this is called “burning the turf.”

III. Fund-raising for Social Change

Giving Money is Different from Volunteering Time

There is a difference between giving money and giving time—both for the person doing the asking and the one being asked. For most people doing the asking, it is naturally more difficult and potentially anxiety-producing asking someone for money than time in a culture so dominated by the acquisition of material things and the competitiveness and anxiety Americans have about money.

Overcoming the fear of asking for money.

For many staff and members, asking for money can be scary. That's OK. The important thing is to figure out strategies to work through this fear. One strategy is to think about asking for money in terms of asking people to volunteer their time. Money is renewable resource; time is a nonrenewable resource. Time, therefore, is a most precious resource because once it's "spent," it's gone, and you can't get it back. Yet, few of us have anxiety about asking a member to come to a phonebank or a rally or a meeting for an hour, even though we are asking him or her to give up an hour of their lives that they then cannot spend doing something else. We ask him or her because we believe that the hour spent at the union activity is worthwhile to the member and will ultimately benefit her, her co-workers and her community. Interestingly, we don't often feel bad if the person turns us down, either, although we may fear being turned down when asking for money.

To successfully ask for COPE contributions we must acknowledge—and then learn to move beyond—our own general discomfort with talking with other people about money. We need to answer whether we believe in the cause. If we do, then we should allow others the opportunity to contribute to that cause. Sounds corny, perhaps, but it is also the most important hurdle for successful fund-raising: believing that you are providing others a chance to participate in something important.

Finally, if we truly believe in our mission to improve the lives of workers and their families and to create a more just and humane society and we believe that building political power is a critical way to achieve that end, we can raise COPE dollars. Not only can we feel comfortable but we can actually feel good about asking people for money, if we approach it with the same conviction with which we ask workers to go on strike, march on their boss, march on the state capitol, etc. If we do not believe in the mission or in politics as a means to achieve our vision of a better world, our fund-raising asks will reflect this and ring hollow.

Confidence and vision come from leadership.

Union leaders and organizers must communicate and act in ways that demonstrate their commitment to the union's mission and to their belief that COPE is a fundamental part of realizing that mission. Members will then learn and feel and exercise the same commitment in raising COPE contributions. This commitment begins with a local's leadership and staff and flows to members. It is part of changing the local's culture and makes asking for money a natural and comfortable part of union life. If the change is real and if it is deep, it will take time. It is the "walking the walk" of organizing and of raising COPE.

How Giving to Politics Differs from Giving to Charity

Most people make voluntary contributions to many organizations.

Like members of the organizing committee who also belong to the PTA, are active in their church and volunteer at the soup kitchen, people who contribute to one organization tend to contribute to others. In fact, seven out of 10 U.S. adults give philanthropically and most support between five and 11 organizations. (Kim Klein, *Fund-raising for Social Change*)

Who contributes money to organizations.

Some people have misgivings about asking lower wage earners to contribute money. While this anxious sentiment is common, and perhaps even understandable, it is important that all members, regardless of income, be given the same respect and right to make decisions for themselves about how and if they will contribute.

Although this is perhaps, counter-intuitive, low-wage workers are actually *more likely* to contribute money voluntarily than their union brothers and sisters who earn higher wages. The statistics are rather compelling.

- In the United States, 82 percent of money given away by individuals is given by those with family incomes of less than \$60,000. (*The Independent Sector in its "Giving and Volunteering in the United States"*).
- Many studies show that poor and working-class people give away more money as percentage of their income than upper middle class or wealthy people. Specifically, the U.S. Census reported in 2000 that households with incomes between \$20,000 and \$29,000 contributed 3.9 percent of their income (as measured in cash and in-kind contributions) to charity, compared to an average of 2.7 percent for households with an income of more than \$100,000.
- Fifty-three percent of African American households give philanthropically.
- Almost 63 percent of Hispanic/Latino households give to charity—an increase of 6 percent from 1995–1998. (www.thegivingforum.org)

We see this pattern borne out in locals with lower wage workers (home care, child care, property services, etc.) who often have higher percentages of contributors and larger contribution amounts than locals with higher wage workers.

Why most people do not make political contributions.

While we should learn from religious and other institutions' successes in the fund-raising arena, political giving is different than purely charitable giving (i.e., money that is given to charities). It is not that far of a leap for most individuals to understand why the local food bank needs money and a large percentage of members will have some familiarity and experience with giving money, canned food or old clothing to organizations such as a food bank, a shelter, a temple, or even to an individual who is asking for change on the street. This type of asking and giving is direct and tangible and often immediate in terms of cause and effect. There is most often reciprocity in the exchange—even the person asking for spare change usually thanks the person handing them change or at least stops asking.

On the other hand, most members will have no personal experience giving to a political candidate, ballot measure campaign, political party, political action committee, etc. According to the Center for Responsive Politics:

- Less than 5 percent of all Americans give contributions to political candidates or parties;
- Less than one-fourth of 1 percent give \$200 or more;
- 70 percent of Americans of voting age said they had never given a contribution to any political organization; and
- Less than 20 percent of taxpayers check the box to make a \$5 contribution to political campaigns, even though it does not increase their taxes.

Lobbyist scandals, corporate money in politics, broken promises by politicians, Washington, D.C., as a “foreign” place, the federal issue of the day or week can and often do create and foster skepticism, cynicism, apathy and even anger. We must be realistic and acknowledge that members do not live in a vacuum of their workplace and their union. Like all things political, people’s feelings about this are affected not just by their personal knowledge of it or what their organizer tells them, but also by what’s in the news, being talked about at their dinner table, with their friends at a bar, by their religious leader or on the blog they read, etc.

Organizing a COPE Political Fund-raising Program

Why COPE is unique from other types of political donations.

One of the most unique aspects of COPE fund-raising is those who are eligible and who will be asked to give are members who are already making nonvoluntary contributions (dues) to the organization. COPE is a voluntary “gift” (in philanthropic terms) *on top of dues*. Put another way, most of us intellectually understand the need for taxes (dues), even if we don’t like paying them. How many of us voluntarily contribute more than we already owe? This is not because we do not care, but because we do not necessarily see this as the way to address what matters to us. With this in mind, it is always important to understand that COPE is a special contribution and should be recognized as such. Care should also be taken to ensure that it is tied directly to the person’s values.

Why people contribute to COPE.

In order to create and implement a successful COPE fund-raising plan, we need to understand why people voluntarily contribute money to the union’s political fund. Like contributors who give to charities, religious institutions, political parties, civic organizations or even to a panhandler, people who give to COPE feel and understand on a “gut” and/or intellectual level a need or problem that needs to be addressed and then commit to being part of addressing that need or solving that problem.

Their perceived need/problem can be personal (they can’t afford the premium for full family health care coverage) or altruistic (they can afford their own health care but don’t think it’s fair that many of their co-workers cannot), or political (they see the larger structural relationships around health care that need changing).

Few members self-select to contribute to COPE on their own. Also, not surprisingly, it is the rare member who contributes to COPE who has negative feelings about her union, is not asked directly to contribute, or who does not see a direct or indirect connection between her values and contributing to the union’s political fund.

In contrast, members who do contribute to COPE:

- Are asked to contribute
- Have positive feelings about their local union, specifically reflected in how they feel about their contract, organizer/rep/steward, union leadership
- Do see/feel a direct or even indirect connection between their values/beliefs/interests and contributing to the union’s political fund

Additional reasons for COPE contributions include:

- **Shared values.** Members care and believe and share the values of the union. They believe that the union’s analysis of problem and solution are correct. “We will never win better wages until health care is more affordable. The only way to fix that is to elect politicians who will fundamentally change our health care system. COPE will help us do that.”
- **Guilt.** Members feel a sense of guilt—they can’t give time, or they feel that they have more money/privilege/support than others.
- **Makes them feel good.** Members find their self-image is reinforced through making contributions and that their contributions express traditions or beliefs that are important to them (this is doubly reinforced by public recognition—see more under Nuts and Bolts section).
- **Reconnects the person to the cause.** Members are reminded of what they care about through giving to COPE.

- **Buying a service.** Members see their contributions in terms of self-interest, that their contributions are essentially a fee-for-service. “If I give to COPE, our union can fight for affordable health care, which my family desperately needs.”
- **Feels included.** Members feel like “insiders,” part of a team or a special group.
- **Believe in collective action.** Members believe that change can only occur through group effort through pooling their individual small contribution with others. “I can’t possibly fight for and win affordable health care on my own, so this investment is worth it to me and my kids.”
- **Gifts and rewards.** Members like the gifts they receive from contributing, the union tchotchke, etc. This is similar to the fee-for-service notion, above, but also speaks to their need to belong and be recognized. Few will give a significant contribution or make a significant commitment just for the gift, but a tangible reward as one layer of contact or one aspect of the reasons for giving is motivating to some people. Who has ever said no to another purple T-shirt?

In the end, givers give, joiners join, but everyone needs to be listened to.

COPE fund-raising requires a long-term organizing strategy.

Simply put: few people like giving to politicians and to political causes. Even fewer are willing to contribute \$50 or more. Consider how many times we contribute \$50 or more to an organization with which we have little relationship or of which we have little knowledge.

For many members, this is exactly their experience with their unions. Most people don’t follow politics, have little understanding of their own union, what their union stands for (or even who their union leaders are) let alone how their union is related to politics and related to them. This simple fact speaks strongly to the need to engage members where they are, and move them through conversation and education to a deeper understanding of their union and a vision of collective action that creates social change.

This type of deep organizing necessarily takes time and unfortunately there is no short-cut around it. But without such an understanding, there is also much less likelihood of successfully raising COPE dollars, for the perceived “value” in giving to a PAC or political campaign is simply not as immediate as giving to a domestic violence shelter. Political giving requires not just seeing but also having faith in a longer-term strategy. Giving to COPE is, of course, giving to a political fund and subscribing to a belief that social change and economic justice require larger, long-term political solutions as well as short-term individual actions.

Assessing for COPE: Using a 1–5 Organizing Scale

Like external and electoral campaigns, people fall along a spectrum, from those who are most willing and eager to give and enlist others to do so to those who will never give to COPE under any circumstances.

And like external and electoral campaigns, one of the key elements of a successful organizing conversation is assessment. This assessment is not necessarily an assessment of their willingness to commit to COPE at first (COPE may not come up during the first conversation) but an assessment of the person’s commitment to the union, its goals, and its programs. Much of this assessment can be done through effective listening when a worker talks about a question quite different from COPE.

How to approach different types of members.

Below is an overview of a typical organizing assessment model that ranks a person's commitment on a 1–5 scale.

1—With you and willing to get others: As in a union organizing drive or electoral campaign, these are the people who are “with you”—the folks that you recruit for your campaign committee. It doesn't take much to move them; they are already naturally inclined to share our union's position, values, and issues. In addition, they are the individuals who will not only contribute (this is comparable to voting union yes or for the “correct” candidate) but who also have the strong potential to move others and enlist others to contribute. Their co-workers look to these individuals for direction. These are the people who you will get through a traditional blitz, or simply by asking them. They are the “low-hanging” fruit.

These individuals “get” the union, why the political program is critical to the union's success and why COPE must be a part of that. They are likely (though not always) stewards or worksite activists. They might also be active in a political party or community organization.

2—Inclined to give/support: These individuals will also be more inclined to give (though it may take more work = more conversations). They are also inclined to support the union and relatively easily see their self-interest realized within it. Follow-up conversations with “2s” tend to be with more information, information connected to the person's issues/interests, or a simple volunteer ask that is easy to do and is directly related to the person's interests. (e.g. if the person likes computers, they can help with data entry or cutting turf for a canvass, or if they are a good cook, make cookies or a pot of chili for a union or political event).

These individuals will be more likely to contribute or volunteer the more directly they see their interest being met. They may not doorknock for a political campaign, but may work tirelessly talking to co-workers about a contract that impacts them directly. They may not care about federal races, but a friend of their friend is running for school board and they care about that. Sometimes 2s are committed union members—some may even serve on the board or as stewards—but are not 1s because they either do not see themselves as leaders, or believe that they are prepared to ask others. Some 2s can turn in to 1s through the course of the campaign or simply over time if their potential for leadership is developed, skills are honed, and commitment is deepened.

3—Mixed/Neutral/Ambivalent: These individuals may have both positive and negative or entirely neutral feelings about the union and/or politics. These conversations take a long time. Trust needs to be built between the organizer and member and the member and the union first, before any ask takes place.

These conversations are about getting to know the person better, answering his/her questions, respectively listening to his/her concerns, providing education that is direct, relevant and not condescending. With work, these folks can become 2s, and hopefully, eventually, 1s. Education that is tied to their values, issues and interests is a key component for moving these workers—not by immediately and directly asking them to donate, which may “poison the well” for future relationship building. This is the heart and soul of long-term organizing.

As in electoral campaigns, these “undecided 3s” need to receive the most contact, attention and time. Typically, a large number of members fit into this category.

4—Generally opposed to the union and/or union’s political program: These members do not “like” the union or their organizer, think their contracts are weak (and they may be), think their dues are already too high and disagree with the political work of the union and the candidates the union endorses. They are not merely skeptical or are unclear about COPE, they are generally opposed. These workers are a lower priority, and will likely never contribute to COPE. However, things do change. A very important issue (injury on the job or other event) may “politicize” the person to support the union on issues rather than on political candidates or program.

5—Openly hostile/will not contribute: These folks give money to the “right-to-work” committee. Forget about them ever giving to COPE. You will never win them over. Respectfully disagree, and spend time developing 1s and building relationships with 2s and 3s.

Assessments must be continually evaluated.

Assessments are tools to gauge a person’s commitment at a particular moment. Yet because members and the conversations and relationships we have with them are not static, assessments must also be changeable. Thus, we work to move people from 3s to 1s, but it’s also possible for the opposite to happen. A bad contract or relationship with an organizer, or a strong disagreement with a union position (political or otherwise) may result in less commitment from a member. Assessments, therefore, must be continuously conducted and updated.

Targeting and Prioritizing: Spending time with 3s and 2s.

It’s often easiest, most comfortable and affirming to talk with 1s over and over and to think of the 1s as the only “good” members. But there are lots of 2s and 3s (and however occasionally, 4s) who do important work. There needs to be a lot more of them, too, and that’s why we need to develop 1s to do the work of reaching out to their co-worker 2s and 3s. This is both hard work and often the most rewarding and exciting work in the union, for it is about developing new leaders.

It is also important to remember that a 3 for COPE may be a 1 for being a picket captain or one of the best stewards because s/he sees his/her values and interests more directly reflected and met in those activities. Certainly, those actions are critical to the union’s success, whether or not the member gives to COPE. Approaching raising COPE as an organizing campaign allows us to see any action as a positive step toward building a more effective union, and as building a relationship which will make a COPE contribution more likely in the future.

Engaging Members about COPE and Politics

Leaders hold themselves accountable.

How can union leaders (staff, MPOs, stewards, executive board members) engage members when most members will see politics as “unclean”? First, we must talk about politics in terms of “accountability” while we also engage in political accountability—i.e. our actions are consistent with our words. Members see hypocrisy easily, especially when it comes to politics. Therefore, we need to have high standards for what defines a “pro-worker” politician and hold candidates and elected officials up to those standards. Candidate endorsement interviews, in-district meetings, and lobby days can all be organized and communicated as “accountability sessions” with politicians.

We can use carrots (dozens of volunteers who will make phone calls to elect pro-worker candidates) and sticks (withhold those activists and endorsements from politicians who vote against workers' interests). We can also explain these carrots and sticks when we communicate with members—how it matches up with their interests and values and how COPE is a key component in this accountability.

Example. While it is true that COPE is a federal PAC to elect congressional candidates, describing it as such is not going to be as compelling for 99 percent of members. Linking COPE to local legislative, or contractual or organizing work, rather than simply to electing candidates is often more effective.

We hold ourselves accountable, too, by communicating with members frequently about how the union's political program relates to their values, interests and issues. We make candidate interviews open to all members. We fully incorporate COPE and politics into the life of the union so it isn't seen as a bothersome add-on every two years.

Engaging issues and interests rather than political parties.

A reasonable assumption would be that most COPE contributors are frequent-voting Democrats. However, most locals that analyze their contributors by who contributes (age, gender, political party, voting frequency, method of COPE ask, job title, amount of contribution, etc.) are more likely to find higher numbers of contributors with shared similarities *other* than being a frequent voter or having a strong Democratic affiliation. Some of these patterns include:

- a specific sector of members who recently experienced a political fight or victory (public school workers fighting for better school funding, health care workers winning safe needles, child care workers winning the right to organize);
- members with a particularly committed organizer with whom they have developed a strong and mutual relationship;
- members who have belonged to the union less than six months;
- workers who won an organizing drive to become union members; and
- members who won a strong contract that involved the help of politicians.

In nearly all of these situations, it is the individual's issues and interest that are important. A security guard who was active in a campaign to win a good contract with the help of local elected officials he lobbied may likely give to COPE because of that experience, even though he may be an infrequently voting Republican.

IV. Infrastructure for Successful COPE Organizing

Creating a Culture of COPE Giving

Because real gains in COPE fund-raising require organizing, it requires us to listen more and have more conversations with members (both in number and depth). In this way, we find the common ground necessary to secure the member's commitment to act, whether that is giving to COPE or giving two hours to phonebank for an election. We need to think creatively about how COPE becomes central to our way of doing business, not as an obligatory "ask" but as a positive and meaningful action.

At the most basic level this means relating to members one on one as people rather than as names on a list of possible contributors. If the only time the union talks with its members is to ask for COPE, whether in reality or in how it feels to the member, resentment and a "No" to the ask is likely. If members are not communicated with throughout the year about how the union's bargaining, organizing and political program is going, or do not see or hear their values and voice reflected in the work of the union, COPE will be meaningless to them. Few members know much about the union (again, most got a job that happened to come with union membership) and their first exposure should not be asking for something (especially for more money) but listening to the person's concerns, ideas, and input—to their story.

Lessons from nonpolitical fund-raising.

Forty-three (43) percent of charitable contributions in the United States are made to religious organizations/institutions (Kim Klein, *Fund-raising for Social Change*). So, what can we learn from these institutions?

- Churches ask repetitively, weekly, at every function, whether a formal service, social event, etc.
- Giving is made extremely easy—baskets are passed, envelopes and pens are available, donation jars/baskets are placed around the building—and oftentimes it is done publicly (the person next to you sees whether or not you added your gift to the basket).
- All gifts are acceptable and welcomed—from pocket change to large checks.
- Everyone can give—the casual attendee, weekly attendee, the new person.
- People can give weekly, monthly, quarterly, yearly, pledge over time (which typically translates into larger gifts).
- Lots of programs to give to—flowers, altar, mission, new carpeting, general fund, etc.
- There is a culture of giving—it is not just OK to ask for money, it is expected. It is mentioned by the religious leader, the lay leaders, and the people who hand out the programs. There is even a special time set aside during the service for giving. This culture is understood and shared—no one is offended or even surprised when the baskets are passed and they are asked to give.

It is taken as a given that the leader of a church believes in the church's mission when s/he asks the parishioners to give each week. The same has to be true of local unions if they are to have any credibility in asking members to contribute their valuable resources—time and money away from their families—to the efforts.

Finally, religious institutions also provide many things for their members, tangible and intangible, from spiritual fulfillment to a place to meet people with similar interests to a welcoming, positive place to go once a week to social services. In this community which they have self-selected to join, members are "fed." After a sermon in which their values are reflected and affirmed, they are asked to give money. The context (the gathering place) and the foundation (the values-based sermon) and a sense of relationship and shared vision are all in place before the ask comes for donations.

Union, staff and leaders must lead the way.

Simply, union staff and leaders cannot ask members to commit if they do not believe and do not commit themselves. Elected union leadership, staff, MPOs and political committee members and a significant percentage of stewards and other member-leaders must be “on board” (i.e. contribute generously to COPE themselves and be comfortable articulating why they give and others should give) to be successful in organizing the broader membership of the union.

As in religious congregations, cultural changes are necessary throughout our locals, but cultural changes at the “top” are especially critical. Even when a local has a solid history of COPE fund-raising, it cannot be sustained and built over time if the local union culture does not complement the demands of the growth. In other words, local leadership/staff institutional buy-in is critical. Elected leaders and staff (at all levels) must lead the way, set expectations and norms for the local’s COPE program.

Starting a conversation with staff and leadership.

Although leadership must set the direction, without staff and leadership commitment to COPE (or for that matter any other union program) it will not be successful. Commitment only comes with buy-in. And buy-in comes with a sense that the staff person’s or leader’s interest is being met by the action—that they are part of the process of creating the program, and that the program is more than just satisfying an external goal, or some externally imposed “quota.” At the minimum earning this buy-in means a serious and genuine interest in involving staff and leaders in developing and shaping the union’s COPE program, to the degree that staff wish such involvement. This means bringing a comprehensive COPE organizing plan to staff for genuine feedback, not simply to tell what “will be expected” or to lay out staff quotas.

One of the ways to begin a conversation about developing and implementing a COPE organizing program is to acknowledge up front that union staff and leadership already have full plates dealing with representing members and doing the other work of the union. No one has extra time to do extra work. A COPE organizing program must therefore be understood and enacted as part of building the capacity necessary to accomplish the goals of a stronger union and a better contract. Some questions that might open a conversation include:

- **Why is politics important to the work we do?** (This question can open up a larger discussion of the specific ways that political action contribute to accomplishing contract and representational goals—or organizing new members.)
- **What are the ways that current members can help secure better contracts—or organize more members?** (This question gets at the ways that members can be engaged and begins to make the connect that building the infrastructure for effective COPE fund-raising also makes it easier to run contract campaigns and mobilize for worksite actions.)
- **How do we currently raise COPE dollars? What seems to work—and not work—and why?** (This starts the analysis process of current practices and helps identify points where buy-in can occur.)
- **What would make efforts to raise COPE dollars more effective?** (This is an open-ended question that will raise a number of good—and specific—ideas for shaping a local-specific COPE program and for building buy-in.)
- **What can we do to help build leadership among members?** (This question can start a discussion of the ways to engage members in union work.)
- **What is required to actually accomplish building worksite communications structures?** How can we use these structures? (This question can get at the nuts-and-bolts of how union leadership can support organizing efforts.)

- **What is a realistic approach to meeting COPE commitments?** What is the current assessment of our local's Strengths, Weaknesses, Opportunities, Threats (SWOT)? (This is perhaps one of the most important questions to assess what opportunities exist to build member engagement and COPE recruitment, and what threats/obstacles/challenges must be addressed/overcome.)

All of these questions are meant to spark a genuine discussion and exchange about the role of COPE and the challenges and opportunities that exist within a specific local union. The point of this discussion is to create a culture where staff and leadership both understand the role that COPE organizing plays in the union (and how it contributes to more effective contracts and new member organizing) and agree to a set of criteria to which they can hold each other (and themselves) accountable.

Integrating COPE into every aspect of union culture.

COPE must be an integral part of staff meetings, one-on-ones, planning sessions, work plans, etc.—not an afterthought or the last item on the agenda that gets 30 seconds of everyone's waning attention. Staff members' successes with COPE deserve and require "public" acknowledgement at unionwide meetings and personal recognition between supervisor and organizer. Like all COPE contributors, staff must be formally thanked when they contribute. (They can't be required to give, nor can we assume that they will—staff, like members, are making a voluntary gift when they give to COPE.)

Example. One way of integrating COPE into the union is to publish the impact of COPE in all of the union's communications. Stories about COPE, profiles of COPE contributors, political victories and calls to action can all be included in:

- **Bargaining communications**—bargaining surveys, bargaining updates; and
- **Internal Communications**—newsletters, notices, Web site (follow legal requirements) and e-news to members, worksite meetings, steward trainings and conferences, bargaining conferences, parties and social functions.

COPE fund-raising is most effective when it is integrated into bargaining, internal and external organizing and in the unique culture of each local so members can see immediately the direct connections between all three. Effectively and frequently communicating with members about COPE, how it helps workers win, who is giving and how others can join is a part of shifting that culture. (See also Part 5. COPE "Best Practices" Toolkit, Page 39.)

Talking with Members about COPE

Language matters.

Language is critical to how we think and communicate about COPE, just as we made thoughtful choices about changing staff titles from business agent to organizer to reflect the changing culture and priorities of our union.

COPE is COPE is COPE—What do we do with a title like this?

Unfortunately, neither the Committee on Political Education nor its acronym, COPE, is particularly inspiring or meaningful in name. While we are stuck with "COPE" in a most practical sense because that language is bargained into thousands of contracts for check-off, some locals have changed the way they talk about COPE when enlisting members to sign up. For example, SEIU 1199 calls their COPE fund the Martin Luther King Jr. Political Action Fund. SEIU Local 503 calls theirs "Citizen Action for Public Employees" and runs a "2 cents an hour for political power" campaign. SEIU Local 32BJ calls it the "American Dream Fund," and still others call it a "Unity Fund."

In a positive way, the lack of compelling official acronym for our political fund ensures that we explain it fully, creatively, and in a compelling and meaningful way to members.

From “Quota” to “Commitment.”

One key element of COPE language all locals can adopt is referring to the amount each local raises as the “COPE Commitment” rather than the “COPE Quota.” Quota, as the anti-affirmative action movement has learned and manipulated to its advantage, has negative connotations for most people as an unfair, arbitrary number. A person makes a “commitment”—a quota is “imposed” from the outside. (There is a reason that National Public Radio and similar organizations call contributions “pledge commitments,” not “quotas.”)

Similarly, referring to COPE as an “obligation” or to “COPE standards” sets up similar and unnecessary barriers. We can’t expect members to be committed to the union’s political program if they feel that they are being asked to give to meet some external “quota,” “standard,” or “obligation” set by someone else, or numbers for numbers sake. People don’t contribute to meet someone else’s goal, rather they join with union sisters and brothers from every local to build political power for themselves.

Just as locals are asking members to make commitments to COPE, locals as institutions are make commitments to their union and to their members by organizing and raising COPE dollars. In both cases, we are working to realize the *commitment* we have made, not to meet a *quota*.

Building Workplace Communications Structures

Worksite communications and leadership development.

Building an effective communication structure is the backbone for stronger contracts, more member involvement and buy-in, a stronger union, and a more effective COPE program. Ultimately, staff organizers alone cannot do all of the work that needs to be done—nor should they.

A communications structure can be an effective organizing tool to:

- strengthen member-to-member and union-to-member communication;
- help mobilize members for important worksite actions, rallies, contract surveys, legislative work, grievance and workplace issues, and political events; and
- help identify and develop new leaders.

Our goals for COPE fund-raising are substantial, but time is our most limited resource. To maximize our impact and to work most effectively and efficiently, we can employ the tools of mapping and charting to assist with COPE. These tools help us track how members are already organized, both formally and informally, how member-to-member communication naturally takes place—and how organizers and worksite leaders can identify, work with, and develop the natural leaders who already exist in every workplace.

The basics of mapping/charting.

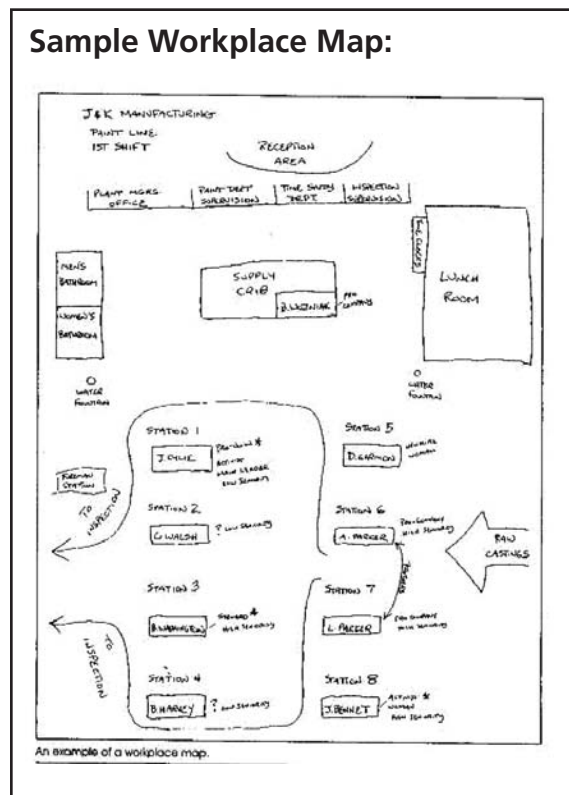
- **Break down the facility by work area.** A work area is the natural and small unit of elbow-to-elbow contact within work places. The kitchen is not a work area. Salad makers are a work area.
- **Divide the members by work area.** Member names are written down on a large chart or a small, hand-held 8½ × 11-size paper for carrying around—or both.
- **Identify leaders within each area.** That doesn’t mean, necessarily, the member who is most pro-union or the member who identifies herself/himself as the “leader.” It means the members who others follow, for better or worse, or the person who is willing to take the time to actually talk with co-workers.

While some organizers distinguish between the terms “charting” (following management’s organization of departments, shifts, locations, and “mapping” (the natural organization created by workers themselves), both are ways of describing a tool to capture the networks of workers in each jobsite to assist the organizer in identifying and assessing members. Just as titles can get in the way of doing the work, making cumbersome distinctions between charting and mapping can get in the way of the task at hand, which is to figure out how best to communicate with workers, at the worksite, on a person-to-person basis.

Using mapping and charting as an organizing opportunity.

The important thing to remember about creating a decent and helpful worksite map/chart is that it is also an organizing opportunity. It requires conversations about who knows what about whom, just as new member organizing, and is an excuse to have conversations with workers about how their worksite/life is structured. The staff or member organizer can begin by asking stewards to help create the workplace chart/map (e.g. help to identify who works where and who knows who, who is a natural leader and who has capacity and could be groomed). This is an easy way for an organizer to initiate conversations and to start building relationships and identifying worksite leaders.

Here are two simple examples of a worksite map/chart —the chart is more structural and may be easier to track data with, while the map is more visual.



Sample Workplace Chart:

City	Building	Steward	Contact	Location	Total
Solid Waste	Varied	Jack Rich	Ray	Brookston Transfer	3
			Sandy	Cook Transfer	3
			Rick	Hibbing ROC	2
			Wayne	Hudson Transfer	3
			Jack	Javel Cannister	2
			John	Northwoods Transfer	3
Cook	Cook Land Dept. Bldg.	Judy	Dick	Regional Landfill	5
			Randy	Land	3
			Sara	Recorders Office	30
			Cindy	Courts - all subdivisions	35
			Ron	Sherriff	10
			Ron	Building Maintenance (2)	18
Duluth	Courthouse (1)	Ron	Ron	Civil Defense	3
			Ron	Microfilm (6)	2
			Ron	Purchasing (2)	3
			Lona	Assessor (2)	20
			Linda	Auditor (5)	42
			?	Auditor - Soc Ser (2)	2
Duluth	County Garage -- Pike Lk Land Dept.	?	Cynthia	Occupational Safety	10
			JoAnne	County Attorney (6)	10
			JoAnne	Pike Lake Land	22
			?	Public Works - 2nd Maint.	5
			?	Dist	
			?		
Duluth	Govt. Services Bldg -- 1	Sharla	Barb	Child Support	26
			Joanne	Initial Intervention	1
			Joanne	MIS (1)	7
			Dan	MIS (6)	20
			Trish	Land Department	6
			Char Dalton	Financial Assistance	89
Duluth	Govt. Services Bldg -- 3	Marsha Char Patricia	Marsha	Child Care	
			Patricia		
			Kathy		
			Sue	Accounts Receivable	8
			Kalee	Audits and Budgets	4
			?	County Attorney	3
Duluth	Govt. Services Bldg -- 4	Sue Kalee	?	Information and Referral	2
			?	Disbursements	7
			?	Office Management	12
			Walt Sorenson	Homemakers/HHA	9
			?	Social Service Specialists (5)	25
			Ora	Financial Workers (5)	11
Duluth	Govt. Services Bldg -- 5	?	Lucy	Clerical (5)	11
			Ed	Health	50
			Mara	Veterans Services	
			Judy		
			Barb	Sherriff	16
			Vi	Assisted Living/Kitchen (KM)	
Duluth	Jail	Joanne	Charles	Assisted Living/Kitchen (MM)	
			Charles		
			Beth	Auditor - Licensing	10
			Paul	Engineering	46
			Ross		
			Paul		

Coding and using the chart.

Workplace charts should be in every organizer’s office, just as every new member organizer has a chart of the workplace they are organizing. This is for simple and easy reference. How you track who does what is up to you. One common way of tracking is using different colors. What you color code depends on the information being captured. For COPE, you may want to highlight all members who have volunteered for an electoral phonebank or doorknock, members who have given to COPE in the past, members who attended a lobby day, etc. Color-coding makes it easy to look at the chart and see where the COPE participation is strong and where more conversations are needed.

Some locals like to put phone numbers and addresses right on the chart to keep all of their information in one area.

Information mapping and charting can capture:

- where members work, location, shift, job class
- who they work with
- who people respect/listen to (“leaders”)
- something to indicate the level of activity in the union (attendance at trainings, involvement in actions, petition signer, etc.)
- something to indicate the level of interest in politics (COPE contributor, have signed voter registration card, interested in phonebanking, passed around an article about a legislative issue, etc.)
- membership status (member, nonmember, fair share payers, probation, etc.)
- employment status (full time, part time, temporary, on call, etc.)
 - ◆ Every member: their name, location, shifts, job classification
 - ◆ Membership or fair share status
 - ◆ New members and/or new employees
 - ◆ Where stewards are, where they aren’t
 - ◆ Level of activity (of worksite leaders and members)
 - ◆ Training status (which stewards or other worksite leaders are attending/have attended)
 - ◆ Contact information (phone, e-mail, address, what else?)
 - ◆ Who belongs to the Contract Action Team, are Member Political Organizers, Stewards and/or other member leaders.

Of course, this level of detail cannot be recorded on a paper chart (on the organizer’s wall) and needs to be recorded in a database designed to record such contacts (see the “Tracking the Data” Page 53). You may also wish to record more “organic” information, such as who eats lunch with whom, who takes breaks with whom, who waits at the bus stop together or who takes smoke breaks together, who organizes the night out and who goes, natural leaders—whether or not they think of themselves as such, etc. This is oftentimes more difficult to record but such relationships are nonetheless important to note in some fashion.

Developing a communications structure off of a map/chart.

Once you have mapped/charted your workplace and identified workplace leaders or contacts, you can develop a simple worksite communications structure that is based on “delivering mail” or having workplace conversations. This is based on breaking the workplace into work areas that have natural affinity (the easiest is by geography) and identifying a workplace contact/coordinator for each work area. Ideally, there should be less than 20 people that each contact/coordinator is responsible for, otherwise the job gets to be too big and the likelihood of the person saying “yes” to the responsibility dramatically lessens.

Building an effective worksite communications structure takes time up front, time that oftentimes organizers are sorely lacking. But it is one of the most effective ways to build worksite leadership and infrastructure—it is hard for members to say “no” to delivering mail. Over time, this structure can develop into a very effective way to communicate during contract fights, survey members on important issues, communicate information about pending legislative, electoral or workplace issues, and to raise COPE dollars. The entire communication structure is built upon face-to-face worksite conversation.

Sample Worksite Communications Grid

Sample Worksite Contact Structure

1 st Delivery Contact	Site Contact(s)	Work Sites	Site #	Total
Bob Barker (Solid Waste)	Bob Barker	Lavell Cannister	2	2
Rick Santori (Solid Waste)	Rick Santori	Hibbing ROC	2	2
Betty Olson (Courthouse)	Janet Jones	Assessor (2 nd fl)	20	74
	Ruth Lahti	County Attorney (5 th fl)	10	
	Ann and Barb Olm	Auditor (2/5 th fl)	42	
	Sara Peters	Occupational Safety (?)	2	
Sara Hanson (Courthouse)	Sara Hanson Sharon Josephson	Recorders (1 st fl)	30	30
Cindy Messer (Courthouse)	Marsha Collins and John Barr	Courts – all subd.	35	45
	Cindy Messer	Sheriff	10	
Ron Sederski (Courthouse and motor pool)	Ron Sederski	Building Maintenance	18	29
	Deb Peterson			
	Ron S.	Civil Defense	3	
	Ron S.	Microfilm	2	
Joan Gilbert (Land Department)	Ron S.	Purchasing	3	27
	Ron S.	Motor Pool	3	
	Joan Gilbert	Cnty Garage – Pike Lk	5	
Shar Gompers (Government Services Bldg)	Howard Stetson	Pike Lk Land Dept	22	34
	Barb Peterson	Child Support (1 st fl)	26	
Char Ditterman (Government Services Bldg)	Joanne Sillman	Initial Intervention (1 st fl)	1	89
	Shar Gompers	MIS (1 st fl)	7	
	Char Ditterman	Financial Assistance (4 th fl)	75	
	Marsha Detner			
	Patricia Holmes			
	Kathy Stevenson	Child Care (4 th fl)	14	

Communications structure model

Developing a communication structure

Developing an effective communication structure is key to building a stronger union. Nothing breeds dissension quicker than lack of information. Building an effective structure also helps build a stronger union simply by involving more people in doing union work. Below is one idea for a communication-organizing structure -- what I call the "mail delivery system of organizing."



The task matters—not the title.

Titles can be intimidating. Accountability and a clear understanding of roles and responsibility is critical to the success of any program. But while responsibility and accountability are important, we can also box ourselves in (and box members out) with labels and titles and acronyms. While they provide ease in internal staff communications, they have the potential to actually limit members' participation. Many members, for instance, will phonebank, canvass, contribute to COPE, attend candidate interviews and lobby days and recruit other members to do the same. Some of them, however, would not call themselves "Member Political Organizers" (MPOs) nor would they sign up to be MPOs, even though they would sign up to engage in all of the activities we associate with the title.

Likewise, being a worksite contact—talking to workers, delivering union communications, helping organizers and stewards—is much less threatening than being a "worksite coordinator," or "steward," which sounds like a lot of responsibility and work. The work still gets done, it's just done by the "contact person" rather than the "coordinator" or "steward."

Data tracking.

Formalized data tracking (mapping/charting and electronic/databases) is also important in a world of limited time, resources and an unlimited amount of demands and priorities. Most organizers keep data in their heads or in personal systems they have developed. This can work for individual organizers in the short term, but there are limits to everyone's ability to retain the extensive and highly-detailed level of data necessary, and if organizers leave the union, the data in their heads and in their personal notebooks leaves with them. Part of building long-term power is capturing data on charts and electronically which ensures that campaigns and organizing continue after organizers leave or change assignments.

Charts are fluid and need to be updated.

Workplace charts and maps are only as useful if they are accurate. The process of filling them out often involves tracking down many people we didn't know were members and removing those people who've left, gone on leave, changed work assignments, or ceased being leaders. Leaders should be taught to chart and to enlist other activists to help. Charting can be used as an initial 'test' of workers who may become more involved in the future. The process of charting and keeping charts updated also pushes worksite leaders to be in touch with members (and nonmembers) in their area.

IV. COPE “Best Practices” Toolkit

Following are lessons gleaned from successful COPE organizing and fund-raising programs from around the country.

Making the Case for COPE

Tying COPE to our mission.

People voluntarily contribute money to organizations, whether the American Red Cross, their local humane society or their grandchild’s Girl Scout troop because they believe in the organization’s mission and believe that giving to that organization will benefit themselves or others in a way that reflects and reinforces their values. Because of this, we need to tie our COPE fund-raising to the mission of SEIU:

SEIU’s mission: We are the Service Employees International Union, an organization of more than 1.8 million members united by the belief in the dignity and worth of workers and the services they provide and dedicated to improving the lives of workers and their families and creating a more just and humane society.

The Case Statement.

Staff and members signing others up for COPE must understand why they are doing what they are doing. In fund-raising, this is called the “case statement.” The local leadership, political director and MPOs/political committee members can craft a “case statement” so that everyone understands why COPE is a key part of the union’s organizing. This is not a flier, but rather the background, the reasoning, which helps create a common understanding among member leaders and staff about why they are contributing and asking others to contribute to COPE. In political and other organizing campaigns this is considered part of message development—i.e. What are we saying? Why is it important? Why does it matter?

Questions that will need to be answered to create the “case”:

- How does COPE fit in to SEIU’s mission and to the local union’s mission?
- Why does the union need a political program?
- What does the political program do?
- How does the political program and voluntary political dollars build power, help members win stronger contracts, change people’s lives?
- Who is “in charge” of COPE?
- What are members’ roles and responsibilities in the process? Staff’s?
- History—what have we used COPE for in the past? What have we achieved?
- How much have we raised? What is our goal to raise?
- How will we do it?

Fundamentals of a COPE Fund-raising Plan

The first thing we need to get started is a realistic fund-raising plan that will become the guide for how we intend to reach the COPE commitment. What do we need to do? How do we start to figure out how we can reach our goals? Who will be responsible for raising the commitment? How will we hold people accountable? All of these are questions that a good fund-raising plan will answer.

Setting and meeting goals.

Below are some key elements of putting together a COPE fund-raising plan (see the COPE Fund-raising Plan Worksheet in the Appendix, Pages 95–98). The plan starts with the overall goal, called the COPE Commitment. This is the dollar amount and the number of members needed to reach a benchmark percentage of participation.

Under this overall local COPE fund-raising goal, your plan needs subgoals for different events, activities, and local staff, leaders and officers. Although it is easier (and therefore tempting) to simply take the overall COPE goal and divide it by the number of staff or union leaders to arrive at individual goals, such goals seldom have a basis in the actual situation in the field, and may lead to unnecessary frustration, resistance, and even failure.

While setting benchmarks and subgoals for meeting your local's COPE commitment, your plan should take into consideration the differences between bargaining units'/worksites' contract strength, whether the contract has COPE check-off in it or not (it is harder to sign up without), the history of the bargaining unit (e.g. Recent decertification attempt? Change in leadership? Strike?), and the political issues that directly affect a particular group of workers (e.g. needlestick protections for health care workers), and the variations between large worksites vs. small and large geography vs. small. Many of these specific issues are addressed below in the "Making a Campaign fit a Local" section (Pages 50–53).

The goal then needs to be broken into how much can be expected to be raised from each source (see the fund-raising worksheet attached to the manual in the appendices). It is very desirable to use multiple sources to reach the local's COPE commitment. This is a fundamental rule of fund-raising—do not put all of your eggs in one basket. Or, diversify and grow. Your fund-raising plan should include the following types of event or activity sources for raising money. Each of these should have the amount of dollars expected to be raised. Each should then also include the actual activities: (1) what they are; (2) when they will happen; (3) who is responsible for making it happen; (4) the budget and/or materials necessary to make it happen. Collectively, all of these sources will become your plan for raising the local's COPE commitment (see the COPE Fund-raising Worksheet in the Appendix, Pages 95–98).

When developing your fund-raising plan, consider multiple possible sources for raising COPE dollars, including:

- Reach Every Member Census
- Contract ratifications
- Lobby Days
- Worksite meetings
- Stewards' trainings
- Stewards' conferences
- Union committees (e.g. L/M, social, economic justice, civil rights, COPE)
- Local social events (e.g. holiday parties, recognition events, etc.)
- New member orientations
- Worksite one-on-ones—member asks
- Worksite one-on-ones—organizer asks
- Candidate interviews
- Phonebank and Canvass Blitzes

How will we achieve these goals? First, establish the timeline. The plan goes from day X to day Y. (e.g. What is your deadline to meet your COPE commitment? One year? Two years?). Then, using the attached fund-raising worksheet, start listing all of the activities, events and actions where COPE asks will be made during the period of time your plan covers. Note: Plans should also provide for numbers to grow in the succeeding years.

The numerical goals for each type of COPE ask will need to be decided according to the local's capacity (Where are they in terms of their political program and member engagement?), the local's internal calendar (contract bargaining, steward conferences, etc.), the political calendar (legislative sessions, local elections, etc.), the number of staff, current contributors, current number of members who can sign up other members, etc.

Fashioning an Effective COPE Ask

There is no one way to ask for COPE.

There isn't a one-size-fits-all script for a COPE ask. COPE asks, while planned in many cases, often rise naturally in the context of a conversation. After identifying and assessing a member to be very interested and invested in the local's campaign for affordable health care, an organizer/fellow member can ask the member about her willingness to sign a postcard, come to a phonebank, give to COPE, or all three. The conversations will help the member understand the connection between her interest and the actions being asked of her.

Sample Approach to a COPE Conversation.

- **Introduction**—Why you are having the conversation now.
- **Problem/Solution**—What does the member care about? How can COPE help? Why the urgency?
- **Ask**—Make the connection and ask for the contribution. The COPE ask itself, like the ask to sign the card or to make calls, must be:
 - ◆ **Clear**—Will you sign up to make voluntary contributions to our union's political fund?
 - ◆ **Specific**—Will you sign up to contribute \$5 per month which will be deducted from your paycheck every month?
- **Wait**—After the ask, the organizer patiently and silently waits for an answer. The member may have more questions—What does COPE stand for? How is this part of the campaign? Can I think about it?—questions which the organizer should answer. Then, the organizer asks again and waits again.
- **If the answer is “no”—Alternative Ask**—If not COPE, then what? Volunteering? Signing a petition? Giving some information? Anything that starts a path toward taking some action that addresses the person's interests.
- **If the answer is “yes”—Instructions**—The different ways to contribute. (This may also be part of the ask).
- **Thank you**—This is so important (more in “Giving Recognition,” Page 43).

An additional explanation about “what exactly is COPE?” may be necessary, such as “COPE is different, separate from dues. It is a voluntary fund made up of contributions from members. It is part of our issue-based, member-driven political program and it helps us make our voices heard and elect pro-workers candidates and hold politicians accountable.”

Creating a sense of urgency in the ask.

Natural disasters and large scale crises where people are in immediate danger or are suffering create a sense of urgency to act, to donate, or to do something to alleviate suffering and try to help. Aid organizations receive unsolicited outpourings of financial donations in these situations because the average person just “gets it,” and understands why s/he needs to help and why s/he needs to help *immediately*.

Most electoral, legislative or issue campaigns won't elicit this kind of spontaneous urgency, regardless of the skill of the organizers or the crafting of the message. There are exceptions: Some political campaigns, while not as heart-wrenching as the suffering of communities hit by hurricanes or bombs, have a different kind of urgency

that many people can feel on a gut level. The 2004 presidential election, in many ways, had this weight of crisis, of momentousness for many people that had never before felt that way about voting. Realistically, however, most elections and most political issues won't carry that weight for most people.

How, then, do we create a sense of authentic urgency and of compelling need to build our program and raise COPE dollars as a part of it? Some issues, such as immediately pending legislation (Congress' efforts to overturn overtime laws, and state legislative efforts to freeze wages or repeal worker safety laws are good examples) will motivate some members. Being in the thick of a contract campaign, on strike or in the heat of some other fight will be the best time to ask them about COPE. Often, though, we need to make COPE asks when there aren't necessarily big issues pending at that moment. Those conversations and asks require discussions of past political campaigns, successes and losses as well as future threats, proactive campaigns and other issues that relate to the members' values and interests. Once again, this reinforces the importance of building relationships with members over the long term so members see COPE and politics as part of everything the union does.

Creating Effective Materials

OK. So there is no magic rap. There is no silver bullet flier that meets every SEIU member's interests and needs. There are no "perfect" materials that will jump off the break room table or the union bulletin board and sign members up for COPE. That doesn't mean that materials and message are not important. Below are some tips for designing materials and using them effectively (see the Appendix, Pages 111–127 for sample materials).

Fliers.

Printed materials such as fliers are helpful tools to assist in conversations. Key: to *assist* in conversations, not to substitute for them. They should be simple, cohesive, specific and member-focused. They also need to be brief, compelling, and intriguing, using real members and real stories. The union shouldn't overdeliver in written materials or verbal communications. ("If you give to COPE, we will pass universal health care legislation.") Photos of members who give, along with their job titles, worksites and actual quotes about why they give speak volumes. Glossy isn't necessary.

It is important to put materials in the languages that members speak. If a large number of workers are non-English speaking, all COPE materials should be translated into Spanish, Russian, Somali, Polish, or whatever language is necessary. This is both a matter of practicality and respect.

Members know how to talk with each other.

Member's stories can be part of actually building COPE and communicating why fellow members should give. We can create COPE fliers as part of a member-to-member campaign, having members share their own stories and using those in COPE materials. This can be done through one-on-one conversations or small, informal focus groups. Members themselves will then come up with how to talk with other members, which fosters leadership development, and is an effective way to communicate. It tells the member that s/he is being "heard" and what s/he is saying about his/her values and interests is being reflected back in his/her union's communications. This builds trust that these conversations are worth the time.

COPE Cards: Keep them simple and legal.

COPE cards are important because they formalize and authorize the member's contribution and the information they contain and capture is legally required, such as regulations about federal PAC money, the member's signature, etc. The cards, in and of themselves, however, do not actually recruit anyone to contribute. Slick graphics and glossy paper won't sign up any more members because the point at which the card is signed, the member has

already said “Yes.” Therefore, COPE cards need only to be useful, simple and legally compliant (see Section VI: “Keeping it Legal,” Pages 57–58).

Different cards will be needed for different forms of giving—authorization for check-off, bank draft, pledge for a check, etc. Cards will also need to be in the languages that members speak and read.

Giving Recognition

Thank-yous are follow-up.

Like other forms of organizing, follow-up is critical. Recognition of COPE contributions is a part of organizing follow-up, like delivering fliers, following a grievance, and updating someone’s phone number in the database. Signing a member up for COPE is not complete without recognition.

A union is different than other organizations. We believe that participation in our union is in people’s own self-interest; oftentimes giving resources in one’s own self-interest is not seen as something to be thanked for. At a phonebank, the member who is volunteering will get food, camaraderie, and a sense of satisfaction in completing 100 dials, etc. When a member gives to COPE, there is less of that immediate gratification.

And again, while money is a renewable resource, it is one that most of us are hard-wired to hang onto. To most people, giving up their hard-earned dollars without something immediate in return (i.e. something they purchase) is a big deal to them. And it is important to note that even when we purchase something at the grocery store, the cashier thanks us, despite the fact that we are *directly* paying for a tangible item. Think of your own work. Even while many of us are paid for our work, how do we feel when we receive a thank you from a supervisor, a colleague, or a member?

Thank-yous are both practical and the right thing to do. They are practical because they motivate people (and may even motivate a person to do or give more). They are a tangible reward and recognition for an exchange that has taken place—in this case, voluntary money for access to collective political power. They are the right thing to do because they also confirm the member’s commitment to the union and the union’s political program, and they remind her/him of that commitment and recognize her/him for that. It is about building a community of respect and mutual recognition.

Personal recognition: The COPE “thank-you.”

A written COPE thank you needs to be sent to every COPE contributor. It should:

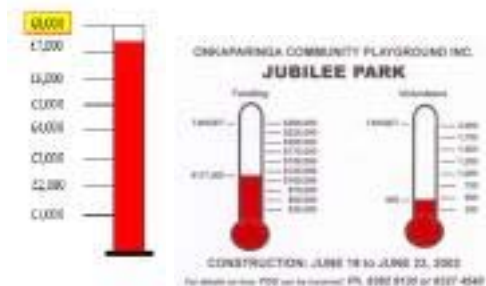
- **Be immediate**—ideally mailed to the member’s home within 72 hours (or, if that is not possible, certainly no more than one week) of the member signing a COPE card
- **Be personal** (Dear Maria, not Dear Member)—This is easily done electronically, with a mail merge.
- **Be hand-signed in blue ink** (so it doesn’t look photocopied) by the local president and a member leader (chair of COPE committee, chief steward, whoever is most appropriate in the local).
- **Be specific and up to date**—“Thank you for signing up to contribute \$2 per pay period to COPE. ... We are currently enlisting the support of politicians to help us pass House Bill XYZ to lower health care costs. Your contribution will...”
- **Include an invitation to the next COPE committee meeting**, candidate endorsement interviews or other activity. (While these will not actually recruit someone to attend, they will help connect the person’s contribution to action steps s/he can choose to take.)

The thank you can also include some small gift that is inexpensive to mail (bumper stickers or other stickers work well) and the most up-to-date political flier or newsletter. It does not have to be elaborate. Think of how many of us proudly wear the “I Voted” stickers on Election Day.

Public recognition for COPE contributions.

After the thank you is sent, the recognition of the member's commitment must continue and be integrated into the cultural life of the union. Here are some examples:

- **Wall of fame**—Hang a list of all local union COPE contributors at the union office (update regularly) in a prominent place. Members (and staff) will look for their own names and the names of people they know. It is both public recognition to reinforce the member's commitment and helps build momentum and "critical mass"—people want their name on the wall. This will work, even in locals with significant numbers of contributors—your font will be smaller, but the effect the same.
- **Communications**—Every newsletter, worksite flier, bargaining survey/update, annual report, worksite bulletin board, etc. should include a list of the newest contributors; perhaps updated each month. Again, folks will look for their names and the names of people they know. Ideally, members should be listed by name and worksite. (See also information about creating fliers and materials.)
- **Thermometer**—A thermometer is a simple, visual tool that can help members and staff track progress of COPE contributions and build momentum. It's best paired with a list of contributors and needs to be updated very regularly as contributions come in. Localwide thermometers tracking the local's COPE commitment reinforce that it is a group effort and everyone is responsible for success. They can be quite simple:



It can also track both total number of contributors as well as money raised to date, such as the double thermometer above.

- **Events**—Conferences, meetings, trainings, celebrations, etc. are great venues to recognize COPE contributors in a “public” way. Special name tags (a different color or with a special sticker) for COPE contributors, special workshops or a COPE contributor-only social event tacked on to a stewards’ conference, or an extra tchotchke do three things:
 - 1) Create a “buzz” that is part of building a COPE culture
 - 2) Recognize and thank the contributors
 - 3) Encourage other members to become contributors—the COPE visibility at the event being one of the layers of contact and also a spark for conversation between members to talk about COPE
- **Prizes/Awards**—While a prize is not a substitute for a values-based COPE commitment, it is a nice acknowledgement and part of culture-building (and branding). Prizes distributed at events to the member who signs up the most fellow members or to a member who has helped build the program in some other significant way reinforce to both the individuals and the group that the union values her work and the COPE program.

The prizes need not be expensive (an SEIU bag, hat, button, or pen are fine), but should be given with thought and with special recognition for an individual's significant efforts, such as the member who signs up the most other members for COPE in a given period. Recognitions such as certificates presented at large gatherings—Member Political Organizer of the Year, for example—cost little but can mean a lot to both the recipient and inspire those in the audience.

Making it Easy to Give

As discussed earlier, one of the strengths religious institutions have in raising money is their institutional openness to different forms and levels of giving. The same can be said of many charities, such as foodbanks, which gratefully accept cans of food, big checks or dollar bills. The more open our locals are to different forms and levels of giving, the wider and deeper the pool of potential contributors. (See sample COPE sign-up cards in the Appendix, Pages 115–126.)

Check-off/Payroll deduction.

Check-off in many ways is the easiest, most efficient, least resource-intensive (especially when done on a large scale) and most ideal way for members to contribute to COPE. It requires the least action on the member's part—all they have to do is sign a card, and the local takes care of the rest. Also, most people don't notice the contribution after the initial payroll deduction and are likely to continue the deduction/contribution for years.

There are some challenges/considerations with check-off because employers play a role in its administration:

1. The union local's administrative staff must be assigned and trained to work with employers to administer COPE and prepared to work with potentially resistant employer staff;
2. Depending on the size and willingness of the employers, COPE systems can traditionally transfer funds (by a check) or electronically transfer the money, and the local must be equipped for both; and
3. Check-off can be difficult to bargain into contracts where employers dig in and want to fight the efforts of a union's political program or the union's power generally, and it's not an easy issue to rally the members at bargaining time. No one will strike over check-off in bargaining units where members have yet to see a connection between their working lives and politics. Certainly it won't be an issue they care about as much as other contract issues.

Be sure to check with your local Area Political Director to see if there are any laws in your state that impact COPE check-off.

Bank draft.

Bank draft (also called ACH) is another way for members to give monthly and on an on-going basis. This is an alternative to check-off if check-off has not yet been bargained into contracts. Even when it has been bargained, some members may not want to participate in payroll deduction for whatever personal reason or preference. With a bank draft, members provide a voided check or savings account slip and their authorization to the union for their contributions to be debited from their bank account and transferred to the local's COPE account on a set day each month, just as many people do with car insurance, etc.

It is important to note that a local is responsible for putting a bank draft system in place and maintaining it administratively through their bank. There are costs involved for the local, including set-up fees and per transaction fees, typically. Note: It is most cost-effective and administratively easiest to run the transactions only once per month, rather than having members pick the date.

There are some challenges to signing up members using this option. Members may not carry their checkbook to work or to union meetings or may not have a bank account at all. This type of contribution is “felt” in one’s pocketbook more obviously than payroll deduction which is taken out before it reaches the member’s bank account. However, where check-off does not yet exist in a contract, this is a decent option. As with check-off, members must give written notice to discontinue giving.

Check, cash, and money orders.

While we may prefer check-off for its conveniences, monthly guarantee of funds and longevity of contributions, other giving options allow members to participate who don’t have check-off or aren’t willing to give via bank draft. These include giving by check, cash (no more than \$50 in cash, per legal requirements) or money order.

These options are certainly more time and administratively intensive than check-off and bank draft; therefore, plans and systems must be in place to record and track pledges and contributions and necessary follow up. Pledge cards, like COPE cards, which include the legal COPE authorization language and member’s signature allow the member to sign up at work or at union functions like other members, but follow up is necessary to ensure the member sends/hands in her contribution. Postage-paid envelopes help aid this, along with a thank you letter reminding her of her commitment and a copy of the card she signed. It also requires quick follow up by the organizer and follow up tracking and then asks quarterly, annually, etc. depending on the member’s pledge.

Choices matter—How much can a person give?

Whatever the member’s choice for *how* they give, they must also have choice in *how much* they give. Standard/recommended contributions amounts should be encouraged, but any amount must be welcomed and appreciated—both in legal terms (it is required) and because it reinforces that everyone can contribute, that \$1 is a commitment as well as \$50 or \$100. Also, realistically, this helps locals successfully achieve a high level of member participation. We aren’t building our union if we automatically leave out folks who just can’t give the recommended amounts. Remember that no one is kicked out of church or frowned on for not using the official contribution envelopes or only putting a dollar in the plate.

Most importantly, the union cannot *legally* mandate the contribution amounts. (This is explicit in the authorization language required on COPE cards.) In some cases, certain employers such as Kaiser Permanente will limit the number of different contribution amounts they will allow for check-off, but members still have the option to give different amounts through means other than check-off. Even with this legal restriction, it is also in the union’s *interest* to welcome different amounts.

While most people will tend to choose the most common, “suggested” amounts, most people will appreciate knowing they have a choice. Someone who contributes \$5 year is still contributing, and that \$5 may be a significant contribution for her. For someone else, \$100 may be significant. Both are voluntarily giving and committed to the program, regardless of the relative size of the contributions.

Note: Most people are most likely to check the second amount on a form. For example, if these are the COPE card options:

___ \$2 ___ \$5 ___ \$10

Most people will choose the \$5 option. This should be considered when making the fund-raising plan. Electronic data tracking will also allow you to track trends in giving to assist in creating the most successful contribution amounts over time.

Moving people up.

Just as the most obvious and potentially easiest people to recruit to come to a canvass are often those who have volunteered before, those currently giving to COPE are the ideal candidates to “move up” in their giving. If properly recognized and continually engaged and moved to action, by increasingly deepening their commitment to and their role in building political power, current COPE contributors will then respond well over time if asked to increase their level of giving. Again, this “moving up” needs to be a personal ask.

Oftentimes, a member increasing her/his COPE contribution is an indication of deepening commitment and the ask is appropriate in terms of leadership development. These members need to be recognized for their increased contribution. They can communicate their own commitment to other members about and encourage others to join them in giving.

Targeting—Being Strategic in our COPE Contacts

Targeting happens every day at a local, whether or not a “COPE drive” is happening. Organizers are building relationships, identifying potential stewards, Contract Action Team members, MPOs, and assessing workers throughout the course of their daily work. Because of this, few COPE asks actually need to be “cold” ones because organizers already know the first people they need to talk with about signing up. This is the payback for doing the organizing work—asking folks for COPE contributions from people you already know and think are likely to say “yes.”

Pick the low-hanging fruit first—but then go deeper because it’s not enough.

All locals—those starting with minimal numbers of contributors to those with years of significant COPE participation should reach out to their “base” or “low-hanging fruit” to build the foundation for COPE and maintain and grow COPE numbers. The base, who may especially appreciate the “insider”/team quality of becoming a COPE contributor, includes:

- Those members who love the union, the “Purple People” who are on board with the union’s program fully, regardless of the issue of the day, the political climate or what’s happening at their worksite
- Politicos—Members who are interested in politics outside of the union as well as within, those who are involved in a political party, who are precinct captains, who give to candidates on their own, who identify as “Progressives.”

These members, because of their predisposition to the union and to politics, are the most likely to respond positively (i.e. sign up for COPE) through a traditional blitz.

But rarely are there enough of these people, and even if there are, more is always better—and stronger. The next best members to target are those who have recently engaged in a particular campaign that has engaged them in the union, such as:

- Members who won a contract victory that included a political component, such as an elected official who spoke at their info picket or wrote a letter in their support to the workers’ employer.
- Members who were activated in a recent political victory, such as lobbying for and winning a specific piece of legislation or volunteering to pass a successful ballot measure or city resolution.
- New members, especially those who have directly benefited from political action when politicians have publicly engaged in their organizing campaign.

Moving members to become the askers.

Ultimately, the best people to ask members to sign up for COPE are other members. Members who do this important work will need to be contributors themselves, trained in assessment and identification conversations and the logistics of COPE (how check-off works, who is eligible to contribute, etc.) For new locals or locals with relatively new COPE programs, the COPE asks will initially be mostly staff-driven while the foundations program are being built. As those programs develop and in locals that already have substantial COPE programs (and as newer programs become more established), energy, resources and time can be focused on identifying, developing and training a cadre of members who can and will sign up fellow members. Members in these roles will need on-going support from staff to encourage and ensure their success. Recognition of their important role is vital—one-on-one and publicly.

Stepping up as a leader, giving to COPE

Making a COPE ask to members who are stepping up as leaders, leaders have real followers, whether or not they see themselves as “leaders” is a broader ask than simply asking for a contribution; you are also about explaining how the person’s leadership is critical to the union’s ability to win for workers, how their co-workers look to them for guidance. These members may or may not be the most political members, but with conversation and development, they can understand why their COPE contribution will have broad implications.

Just as it took conversations and deeper organizing to engage them in action and leadership, signing these emerging leaders up for COPE will require more work than with the Purple People and the Politicos.

Beyond the Blitz: COPE as Daily Union Work

As the giving culture of the union is solidified, COPE will naturally become a part of every piece of the union’s work—worksite meetings, worksite visits, steward trainings and meetings, bargaining team and contract action team meetings, staff meetings, conferences, etc. These forums are all opportunities for conversations, for asks, for integrating COPE into bargaining, worksite organizing, external organizing, and the day-to-day life of the local.

For example, monthly worksite meetings can have an ongoing agenda item during which a member reports about a political action, activity or update, and reminds members about what it means to them and how COPE makes it possible.

Events.

Contract ratifications, conferences, special trainings, lobby days, canvasses, phonebanks, and new unit organizing victory parties all offer excellent opportunities to talk about COPE. If pro-worker politicians speak at any of these events, having them talk about COPE reinforces that contributions to COPE can have real outcomes, i.e. electing pro-worker candidates who will stand with the members and fight for their issues.

These are most often group rather than individual asks because of the nature of the event. During this type of ask, people may sign up because others around them are doing so, and they may be moved by the spirit and excitement of the event and the COPE pitch. It’s good to prepare a member in advance who will commit to signing up at the event to get the ball rolling so that others will join in.

Raffles can be included in events to raise COPE money but they should be seen more as a part of culture building than a principal form of fund-raising. They are fun and they raise money, but should not be relied on as the key component of a local’s fund-raising plan. There are legal considerations involved with raffles, and ultimately they do not build a base of power any more than raising funds for schools through a lottery build a better education system or stable education funding.

New members.

New members can be asked for COPE at the same time they become members. As such, they are an exception to the otherwise necessary series of conversations that most members require before committing to become a COPE contributor. Both new members who have joined the union through an organizing drive, particularly when there was a political component to their campaign, and people who become new members through employment at an existing bargaining unit will be inclined to sign up for COPE as they are signing their application for membership.

There may be a more or less formal new member orientation, depending on the bargaining unit, worksite and whether or not there is employer-paid time for it. It is usually possible to make a COPE group ask at an orientation (with larger employers). At other employers, one-on-one asks members “welcoming” their new co-worker to the union, which creates an opportunity for members to mentor new members. The important thing is to talk with new members about COPE as early as possible in their new employment.

COPE is part of everyone’s job description.

COPE fund-raising needs to be added to job descriptions and expectations of staff, stewards, MPOs, executive board members, and other union leaders. As new people fill these roles over time, the expectation will be there from the beginning.

Reach Every Member (REM)—member census.

There is a role for concentrated, special unionwide COPE campaigns. These do not substitute for the integration of COPE into all aspects of the union, but they have a special role in creating a sense of excitement, something new (or an annual event), or creating a new direction (especially if a local does not have a history of COPE activity). One of the most effective campaigns is the Reach Every Member (REM) program.

Reach Every Member (REM) Census campaigns offer a good way to update member’s contact information, recruit and/or develop member leaders, run voter registration drives, run surveys or other data-gathering and offer a great “excuse” to talk about and sign members up for COPE (see the attached REM plans in the Appendix, Pages 95–101).

The basic census asks for member data—name, address, phone, e-mail, job title/class, shift, worksite location, whether or not the member is matched to the voter file, etc. They also include a COPE sign-up form and collect some other data, such as one to three questions about the contract, interest in steward training, other issues that would be helpful for the local to identify. Be sure to include some questions that are nonpolitical to reach and engage the broadest audience possible.

One sheet is printed per member and then broken out by worksite. Organizers and member leaders move these through worksites, asking members to update/complete their contact information, answer the questions, talk about and ask folks to sign up for COPE.

Depending on the goals of the REM campaign, it can be unionwide (all at one time or over a period of months, though REMs should have a turn-in deadline no longer than three weeks from initial distribution to ensure their completion) or focused on specific bargaining units or worksites, “problem” worksites, or bargaining units that have an upcoming contract or political fight. Targeting these worksites/bargaining units should be part of putting together the political plan.

Several considerations need to be taken into account when launching an REM campaign:

- **Data entry.** Who is responsible for entering the data when the census forms come back? What is the capability of the existing database to track the information collected?
- **Making a plan.** There needs to be a plan to move the census, and ideally this plan builds toward more than one goal (e.g. a contract campaign, or legislative fight). This way the work is not seen as an “add on” to staff but as part of building a larger campaign.
- **Training.** Training people to use the census is critical, as is training for all aspects of an organizing program. Take the time to develop success. The payback will be much greater in the end.

Making a Campaign Fit a Local—Strategies to Overcome Challenges

COPE programs to meet individual local differences and nuances.

There is no off-the-shelf program that will fit each local. The fund-raising plan—from changing or strengthening the union’s fund-raising culture to materials to who drives the campaign (staff or member volunteers) will depend on the local union, its state, region, political climate, contract campaigns, etc. and where the local is in terms of capacity and commitment.

Those locals with an already solid COPE program have the opportunity to focus more on recruiting and mentoring members who will do COPE fund-raising. Locals starting more at the beginning will need to invest time and resources into building a foundation for long-term success. Building basic infrastructure takes time, and progress toward this is critical for any long-term success. The result of launching into a program guided by raising a number rather than building capacity and the infrastructure to sustain it is ultimately frustrating, and largely unsuccessful.

Private versus public sector.

Public sector workers will generally have some awareness that elected leaders have a great deal of power in deciding their wages, hours, and working conditions. Members as voters have the opportunity to elect their own bosses and use their role as someone in public service to advocate for adequately funded public services and public employee pensions. The connection of their day-to-day work life and COPE can be strong. That said, less direct but also important issues on the federal level might still take more conversations for a public school employee or local government worker.

On the other hand, private sector workers may initially feel a less direct connection to state or local political issues, but also may be more engaged with federal issues that affect a broad spectrum of workers, such as immigration, overtime, Social Security, national health care issues, or civil rights issues. Or they may be connected to contract issues that relate to funding issues, e.g. Medicare and Medicaid funding for nursing home workers.

In both cases, we need to help draw connections at all political levels, and work on and communicate about both proactive and defensive legislation/ballot measures. We must help members see that while legislation XYZ doesn’t affect them directly, its implications are huge—paycheck deception for public employees only, Medicare reform which affects seniors only, minimum wage which affects only lowest paid workers, and Social Security and pensions that may seem distant for younger workers. Again, this is why organizing conversations that get at member issues, interests and values are so important for the organizer in figuring out how to frame the individual ask.

Michigan’s Local 517M (a public sector local) has successfully used the following in its COPE program: Leadership who submit lost time or travel expenses for their union work can contribute to COPE using their

reimbursement/expense vouchers. They hold regular dinners for COPE recognition where they use the opportunity to re-sign members for check-off. And they use contract time to include COPE language.

Low-wage versus high-wage workers.

Reflecting the giving patterns by income in the United States mentioned earlier, lower wage workers may give at higher levels (both in numbers of contributors and in amounts given) than higher wage workers. There are many theories why lower wage workers have less to lose and more to gain; they more readily understand their fate as tied to collective solutions; they more acutely understand the power of money. But many locals will indeed find that those workers in lower pay classifications will be more likely to contribute to COPE with fewer contacts/conversations.

Single member, small worksites.

We need to recognize that a lot of worksites, such as home care, single janitor buildings, child care and others, have one or two members. For the most part, a lot of conversations will have to be on the phone and at group meetings, not as much one-on-one in person (see the Appendix for “Tips for Reaching Home Care Workers,” Pages 112–114).

Group asks can actually work well if you have a positive group and at least one person prepped to sign up. This gets other people to do so. Think of the contexts and opportunities to make these asks, e.g. contract ratification votes, informational meetings, holiday parties, etc.

New locals or new COPE programs.

New locals can start right in, creating their COPE fund-raising culture from the beginning. This has obvious challenges, but also opportunities: the benefit of having no history or attitudes of “life without COPE.” New externally organized units, if educated about politics and COPE as part of their organizing drive, come with a similar benefit. Organizers can take the opportunity to sign up these new members for COPE as the members are filling out their membership applications and attending their first meetings as new union members.

During new organizing drives we can talk about COPE as an advantage of union membership so the union’s newest members already have basis of understand the links between organizing, bargaining, and politics. This is doable, especially since most organizing drives now involve politics (politicians signing on support letters and joining picket lines and rallies, workers’ rights boards, ballot initiatives to gain collective bargaining rights). This requires the inclusion of political information in fliers, meetings, and other communications with workers during the organizing drive. This also requires the external organizers to be as well-versed in politics as internal organizers, which is not always the case.

New COPE programs in locals that have previously done less work on COPE will take some time to get going. There may be old habits and attitudes to address. Sometimes key leaders have not bought into the importance of COPE, or perhaps they do not know how to get their arms around the task or develop an effective program.

Initially reaching out to the “base,” the Purple People and the Politicos will help start the momentum. Changing culture takes time, of course, and because of that, the place to start will probably be with the base, changing language and materials, training staff, etc. Educating members about politics and COPE will take longer, as it may feel, especially to longtime members, that this is a new program (even a new “burden”) “coming out of nowhere.”

Locals coming out of difficult times—trusteeship, losing membership, dormancy—will need to put substantial resources of time and energy into working on and communicating with members about a number of campaigns (state legislative issues, federal issues, local ordinances, ballot measures, political support for contract fights) to show members that the local can and needs to do political work to build power for members. Engaging members on COPE first before this type of education and conversation with members has occurred will likely be much less successful. Engaging members on these campaigns first will be critical to members’ willingness to voluntarily contribute to COPE.

For locals with vibrant histories of activism and COPE giving, an increased COPE commitment can be seen as an opportunity to change and grow, to develop leaders and longtime members in a new way, and to develop activists as leaders in worksites that have not been as active.

Noncitizens can still help.

U.S. citizens and legal permanent residents can give to COPE; noncitizens cannot. This, however, does not mean that noncitizens cannot help out. While ineligible to contribute to COPE, they can contribute their time and other resources toward building the union’s political program—talking with members who are eligible to contribute and to vote and also participating in the array of other political activities. About how COPE fits into the larger picture of building political power is still worthwhile conversations to have with these members because they will hear about COPE throughout the local. They can see how their political actions combined with their co-workers’ contributions build power, and often they have a very direct interest in political decisions, e.g. immigration or health care benefits.

The employer hasn’t sent in the COPE check-off.

Your union has won COPE check-off but the employer hasn’t sent in the check to the local union. What now? First, congratulations for noticing. Careful tracking of your COPE sign-ups is key. If you are having a problem with this, congratulations, you at least are aware that your employers are delinquent! Some locals have implemented systems to identify when the employers have not sent in employee contributions. A local in the Midwest automatically generates a letter to the employer inquiring about why the COPE funds have not been sent. When employers are violating the contract, it is important to enforce that contract, and filing a grievance would be your next step. To learn more about systems to track whether employers are sending COPE check-off, contact your APD or state council.

Ongoing conversations and attrition.

Once someone signs up to give to COPE, the “conversation” is not over. Work at keeping members engaged, remember why they give and continually tie their contribution to activities of the local and let them know how they can participate.

There will be natural attrition in every local. Airlines overbook by about 120 percent because they know from past experience that not everyone shows up—even if they buy a several hundred dollar ticket. Most fundraisers use the rule of 80 percent—80 percent of pledges do not result in a contribution. And most nonprofits only retain two-thirds of donors from year to year, even with strong, consistent fund-raising programs.

Simply put, we need to recruit more COPE contributors than we think we’ll need, and we will need to continue recruiting. Because COPE is tied to union membership and therefore employment at a particular place and workers increasingly change jobs every few years, locals will necessarily lose a percentage of COPE contributors each month when people change jobs. Also, a certain number of members will drop their COPE because of

personal dissatisfaction with the union (their contract, a new organizer, a grievance lost) or a change in personal financial circumstance or other reason.

Locals with especially high attrition.

The average period of giving for bank draft donors (those who give monthly through automatic debits from checking or savings accounts) to nonprofit organizations and charities is seven years. Payroll deduction could last even longer, since people “feel” this gift less. However, a high incidence of members leaving their job or union could undermine this potential for long-term giving. With low-income workers who move from job to job more frequently than higher wage workers, this attrition will be more substantial.

Tracking the Data

The key to running a successful COPE program—targeting, assessing, evaluating and adjusting it—depends on accurate data. Data tracking is critical but it need not be terribly complicated. There are several key elements that need to be recorded.

Tracking relationships/conversations.

Tracking data is key to building relationships, making assessments, and asks over time. With hundreds and thousands of contacts, proper data tracking is a necessity. Notes about conversations should be tracked, as well as members’ issues, interests, affiliations, etc.

The best and most effective data tracking systems have the ability to record pledges (which members signed up to phonebank) and actions (who actually showed). Areas for notes with dates to track conversations are also essential. You must set up a system that is localwide so that each individual organizer does not have her/his own special codes that no one else can identify entering the data in a timely and useful fashion takes time. This administrative capacity needs to be built into internal organizing and COPE fund-raising plans.

Electronic tracking and databases.

Programs, such as Organizer’s Toolbox, allow for ready-made and extensive data tracking. However, COPE fund-raising cannot wait for and does not hinge upon the “perfect” data system. Many database programs currently used by locals, even Excel spreadsheets, will work for this.

Tracking COPE sign-ups.

Tracking contributor data is necessary for the legal filing requirements of COPE, to track progress and accountability and also to help illuminate where the local is being successful and where it may need more or different work. Data to track electronically:

- Contributor’s name, ID number
- Job title
- Worksite
- Work area
- Shift (Codes as simple as Day, Swing, Graveyard will assist organizers in knowing when and how to contact members.)
- Contribution amount
- Date of contribution authorization (or, in case of check, date of pledge and then date received)
- Type of contribution—check-off, bank draft, check
- Member’s assigned organizer
- The person who did the actual ask—the organizer, a co-worker, steward, etc.

- How the member signed up—worksite one-on-one, contract ratification, steward training, Reach Every Member, etc.

This will allow you to see trends—percentages of members who sign up at contract ratifications vs. worksite one-on-ones, which worksites have the least contributors, which times of the year are most successful asks taking place, etc.—and adjust your fund-raising plan as necessary. Tracking assignments and solicitors also helps in accountability.

Building Responsibility and Accountability into COPE

Any effective COPE program needs to take the particular challenges of the local and worksite into account, must be strategic in its long-term vision for building worker power, and accountable to specific and measurable benchmarks.

What is progress and how do we determine it?

The big question is: What is progress? When do I know that I am making it? What are the standards to measure? Certainly, going from 0 to 100 is pretty huge. “Most improved” is also a valid measure of success and progress. How we track the more subjective and nonquantitative aspects of a campaign are harder to determine, but nonetheless important. How do we determine a “change of local union culture?” Or “A new commitment to COPE?” These forms of evaluation and accountability, like all good organizing, are ultimately grounded in relationships and conversations, this time between the local and the International.

Establishing and tracking assessment criteria for COPE organizing.

There are several key criteria that should be tracked and measured to assess both progress toward meeting a COPE commitment and for building union capacity (see Assessment Criteria in the Appendix, Pages 84–85). These measures include:

Meeting the local’s COPE commitment: Key measurements for monitoring a fund-raising program and for making strategic assessments and adjustments to that program.

- Total number of COPE dollars raised as a percent of COPE commitment
- Total number of COPE contributors as a percent of union membership giving
- Percent of membership on COPE check-off
- Average contribution per COPE contributor

Building the local’s membership capacity: Key measurements for monitoring an internal organizing campaign and for making strategic assessments and adjustments to that program.

- Number of worksites mapped as a percent of total worksites
- Number of worksites with worksite leaders—contact people—communication structure as a percent of total worksites
- Number of MPOs and COPE captains (or their equivalent)
- Number of member volunteer hours/recruitments (from election tracking form)

Three additional criteria:

- Number of COPE commitments obtained (broken out by those recruited by members and leaders vs. by staff)
- Number of member-to-member contacts vs. staff-to-member contacts (this will depend on current database capacity)
- Number of times members received written communications from union (worksite vs. mail)

Attached to this manual as Appendices are two grids that can help with assessment—*Tool 1: Assessing Our Local Union's COPE Political Program* (which is a series of questions that can be used to systematically assess a political program as *both* building capacity and meeting a COPE commitment—Page 86) and *Tool 2: Stages of COPE-Political Program Development* (a series of benchmarks that can be used to measure a local union political program from “reactive” to “power-building”—Page 87).

V. Keeping it Legal

There are some very specific legal requirements involved with fund-raising for COPE. Please note that this section does not represent substantive legal counsel. Laws change regularly. Questions can be directed to John J. Sullivan in the SEIU Legal Department at 202-898-3465 or sullivanj@seiu.org.

Rules for SEIU COPE Fund-raising and the Handling of Contributions

SEIU and SEIU COPE may solicit union members, union executive and administrative personnel (who are not themselves represented by a union other than SEIU), and their families to contribute to SEIU COPE. 2 U.S.C. § 441b(b)(4)(C); 11 C.F.R. § 114.6(b). In order to be eligible to be solicited for SEIU COPE, an executive or administrative staff person must be exempt from coverage under the FLSA, i.e., a salaried employee.

Unsolicited contributions may be received from any lawful source. 11 C.F.R. § 114.5(j). A member of another union or an SEIU staff person paid on an hourly basis may make an individual contribution to SEIU COPE or participate in an SEIU COPE fund-raising event, so long as they have not been specifically asked to contribute or participate. No contributions from employers should be accepted.

Neither SEIU nor SEIU COPE may knowingly solicit or accept a contribution to SEIU COPE from a foreign national, i.e., an individual who is not a citizen or lawful permanent resident of the United States, 11 C.F.R. 110.20. “Knowingly” not only means having actual knowledge of the contributor’s status, but includes being “aware of facts which would lead a reasonable person to conclude that there is a substantial probability that the source of the funds solicited, accepted or received is a foreign national.” 11 C.F.R. 110.20(a)(4)(ii).

Any method used by a corporation to raise money for its own PAC, such as payroll deduction, must be provided to any union representing any employees of any branch of the corporation, at the union’s request and expense. 2 U.S.C. § 441b(b)(6); 11 C.F.R. § 114.5(k).

The Federal Election Commission requires that the union include certain “disclaimers” in any written solicitation for contributions to its political fund. These disclaimers include a statement that the contribution is voluntary, that it is not a condition of employment or membership in the union; that any suggested contribution amount is simply that, a suggestion, and that the individual is free to contribute more or less without fear of favor or prejudice, etc. SEIU has incorporated these disclaimers into a standard check-off authorization card which must be used for all SEIU COPE contributions made through check-off, unless an alternative card is specifically authorized by the SEIU Legal Department.

For each contribution that exceeds \$200 annually, either by itself or when added to all previous contributions made by the contributor in the current year, the local union must collect and forward to SEIU COPE the following information for each contribution: the amount of the contribution; the date of receipt; the donor’s name and address; and, the donor’s employer. For individual contributions in excess of \$50, the local union must collect and retain the following information for each contribution: amount of contribution, date of receipt and donor’s name and address. 11 C.F.R. 102.9

Neither SEIU nor SEIU COPE may accept a COPE contribution in cash from a named contributor in excess of \$100 or an anonymous cash contribution in excess of \$50. 11 C.F.R. 110.4(c). An individual contributor may give up to \$5,000 to SEIU COPE per year. 2 U.S.C. § 441a(a)(1)(C).

All contributions of \$50 or less shall be forwarded to SEIU COPE within 30 days of receipt. All contributions exceeding \$50 must be forwarded to SEIU COPE within 10 days of receipt. “Forwarded” means placed in the mail, properly addressed and postage prepaid, to the SEIU COPE Treasurer in Washington, D.C. 11 C. F. R. 102.8

All local union staff that handle or process SEIU COPE contributions should complete the online “Secretary-Treasurers’ Training” found at the SEIU Web site, www.seiu.org.

Any questions regarding the legal requirements applicable to fund-raising for SEIU COPE should be directed to John J. Sullivan in the SEIU Legal Department at 202-898-3465 or sullivanj@seiu.org.

VI. Training Curriculum on COPE Organizing

Below are three one-hour to one and a half-hour training modules for preparing field staff, MPOs, organizers, stewards, and other member activists who will be responsible for implementing the COPE as Organizing program.

This training curriculum is divided into three sections:

- **Organizing and Mobilizing** (60 minutes)
- **Fundamentals of Fund-raising: Making the Ask** (60 minutes)
- **Simulation Exercise: Practicing COPE Conversations and Assessments** (60–90 minutes)

How to use the training modules.

The curriculum is designed so that each section builds off of the next. Mobilizing conversations make little sense without the context of finding common ground. This is the heart of organizing conversations, and the two types of conversations have a very different approach and aim. Ideally, the training program should be given in its entirety in a single day (see attached sample training agenda).

However, this training can also be broken up sequentially and done over several sessions: e.g. a one-hour training on organizing conversations, followed with another one-hour training on fund-raising and mobilizing conversations, and a one-hour practice session on having a COPE conversation. As individual modules, each can be built into a steward training as an hour-long session, or a staff retreat, or even an executive board meeting.

How the modules are laid out.

These training modules are designed to be modified by trainers based on their own training preferences and needs. All trainers should study and learn the material before the training. Some trainers prefer to study and absorb the material before the training, then work off a very abbreviated outline that prompts recollection and highlights key concepts (see the abbreviated training outline that precedes each module). Other trainers prefer to train from main point to main point and think through the transitions of how you get from Point A to Point B and fill in the details based on their own experience. Still other trainers are more comfortable having a training outline that goes into much more depth and is scripted.

There is no “right way” to train, nor is there a perfect training outline. We have tried here to address multiple training styles in the following modules. The expectation is that each trainer will modify the materials or highlight the pertinent sections, so they work best with the trainer’s style.

Each module begins with a shaded box that highlights the recommended flip charts the trainer should prepare before the training begins. These flip charts are referred to throughout the training module.

The earlier sections of this COPE manual provide a much more extensive background for understanding the overall COPE organizing program and the background behind the basic concepts of the training modules.

Sample training agenda

Building Our SEIU Power Through COPE

9:00–9:15	Introductions/Review Agenda
9:15–10:00	Why COPE? Why Politics Matter? <ul style="list-style-type: none">• Discussion/Brainstorm about how politics connects directly with the local: contracts, organizing efforts, political goals.
10:00–10:15	Break
10:15–11:15	Organizing versus Mobilizing <ul style="list-style-type: none">• Discussion and practice of intentional organizing 1:1 conversations and assessments as the foundation of all effective fund-raising and member mobilization.
11:15–12:15	Fundamentals of Fund-raising <ul style="list-style-type: none">• Introduce the fundamentals of fund-raising: who gives, why, and how to make an effective “ask.”
12:15–1:15	Lunch
1:15–2:45	Simulation Exercise: Practicing COPE Conversations and Assessments <ul style="list-style-type: none">• Practices the lessons of organizing and mobilizing conversations within the context of a worksite conversation.
2:45–3:00	Wrap-up and next steps

Module 1: Organizing and Mobilizing

PREP (before the session begins):

1. *Flip Chart*: Write session purpose.

Session Purpose

- Discuss and demonstrate the relationship and differences between organizing conversations and mobilizing conversations
- Emphasize the importance of genuine “conversation” and “listening” as key organizer skills
- Discuss how to identify and assess a person’s issues, interests, values, capacity, and commitment
- Introduce the fundamentals of grassroots fund-raising
- Provide practical tips for a successful COPE conversation
- Practice asking for COPE contributions

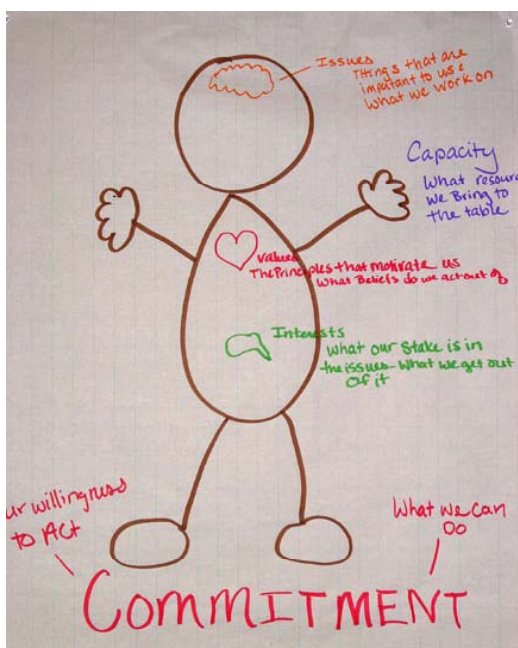
2. *Flip Chart*: The difference and relationship between organizing and mobilizing.

Organizing and Mobilizing

- Organizing = Building relationships, capacity, and commitment
- Mobilizing = Motivating people to act on what matters to them
- Organizing + Mobilizing = Power

3. *Flip Chart*: The diagram and definitions for an organizing conversation.

Issues, Values, Interests, Capacity, Commitment



Draw out a stick person and label the following.

Issues (head) = what we work on/think about.

Values (heart) = our core principles that motivate us.

Interests (gut) = what our stake in an issue is.

Capacity (hands) = what resources we can offer (time, money, talents).

Commitment (feet) = our willingness to act; what we will do.

Module 1: Organizing and Mobilizing

Abbreviated Outline

60 minutes total

I. Welcome and Overview (:05)

II. Why People Volunteer (:05)

- a. How many of you are volunteering for an organization that is not the union?
- b. Why do people volunteer? *[Flip Chart]*

III. Organizing versus Mobilizing (:05)

- a. **Organizing** = building relationships over the long term
- b. **Mobilizing** = motivating people to act on a common concern or toward some goal
- c. **Organizing + Mobilizing** = Power

IV. Organizing Conversations (:10)

- a. **Intentional conversations:** conversations with an agenda
- b. *[Flip Chart]*
 - i. **Issues** = the things we work on
 - ii. **Values** = our core beliefs
 - iii. **Interests** = our stake in an issue: why it matters to us
 - iv. **Capacity** = what a person can offer (his/her skills)
 - v. **Commitment** = what a person will actually do (his/her actions)

V. Demonstrating a 1:1 Organizing Conversation (:35)

a. Trainer 1:1 Demonstration (:15)

- i. Model 1:1 conversation; debrief; *[HANDOUT]*

b. Participants Practice 1:1s (:20)

- i. Pair up: 5–7 minutes each person as organizer
- ii. Debrief
 - 1. What did you learn?
 - 2. What questions worked best to open up a conversation?
 - 3. How did the conversation change in “feel” from being the organizer compared to the person being organized?

Module 1: Organizing and Mobilizing

Full outline

60 minutes total

I. Welcome and Overview (:05)

- Welcome participants as they arrive. Thank them for their hard work and dedication to building power for workers. Tell them a little about yourself:
 - i. Name
 - ii. Your union
 - iii. Your role in the union
- Have participants briefly introduce themselves
- Start with something like this: *“We are here to talk about grassroots organizing and mobilizing, one of the cornerstones of building collective power. One of the key components of building our local’s power and our union’s power is our political program, which we call COPE (Committee on Political Education). COPE is called COPE because at its best and at its most effective, it is about political education—not just asking members for money—just as a union should be more than simply asking members for dues. Political education is grounded in organizing and in genuine conversations. So, in this training we will have several key goals that will help build a political education program that translates into building real worker power.”*
- Review the Session Purpose as listed on the **Flip Chart**.

Transition—**“Let’s get started”**

II. Why People Volunteer (:05)

- **Introduce:** “A key thing to remember is that giving a contribution to COPE is a voluntary act (which is different than paying dues, or taxes which are not volunteered). So, to start, we want to step back from political fund-raising for a few minutes and begin with a more basic discussion about why people volunteer—for the union, or for anyplace.”
- Start with questions (ask for brief answers)—
 - i. *How many of you are volunteering for an organization that is not the union?* [have participants raise hands—Ask a few participants why they have volunteered. If the answer is that they do not volunteer because they are “too busy” because of their union work, suggest that this is the situation for many members—that they are too busy to volunteer for union work. This can be revisited as the training goes on.]
- Then ask participants:
 - i. Why do people volunteer? [participants shout out answers and the trainer or a “volunteer” helps list them on the Flip Chart]

Note: Encourage participants to draw on their own experiences. Note their suggestions and be sure to include the following reasons for volunteering:

- interested in the issue/candidate
- they were asked—

Note: stress the importance of making a direct ask: specific task, specific date/time.

- social outlet
- opportunity for a job

Note: college/high school students will volunteer for class credit or young professionals will volunteer for experience or references.

- personal friendships

Note: get friends and family to do a mailing or phone calling together.

- they like the recognition

Note: THANK THEM. Volunteers are not thanked unless they are thanked three times!!

Key Point: People volunteer because something matters to them.

People have all kinds of reasons why they volunteer, but ultimately people only volunteer because it matters to them. They get something out of it, something that makes it more important than all of the other things that crowd into their lives.

Transition—“Let’s talk a little bit about how we get to know what matters to folks—what motivates them. This is all about building relationships.”

III. Organizing versus Mobilizing (:05)

- **Introduce:** “In the labor movement we often focus on mobilizing people: for example, we need 15 people for a picket line, we need 50 people for a rally, we need “x” people for this action or that one. We need you to contribute “x” dollars to COPE. Do the bodies always show up? Do the people always contribute?

[Note: these are questions that are only meant to get people to think of all the times people haven’t shown up or haven’t contributed to COPE.]

“And when they don’t show up or don’t give, we blame members for not caring or being apathetic, or blaming the staff for not working hard enough, for simply not caring. How attractive is blame for a potential volunteer?”

Before focusing on how to “mobilize” people we need to talk a bit about how we organize them.

- Show prepared **Flip Chart** with definitions of mobilizing and organizing.
 - a. Organizing = building relationships over the long term with people to get to know them and find common ground; building commitment and leadership.
 - b. Mobilizing = motivates people to act on their commitment toward some specific action (e.g. a demonstration, or to vote, or to contribute to COPE)
 - The most effective mobilizing is done through the most personal connection.
- Rule: The more personal the connection, the more effective.
 - c. Organizing + Mobilizing = Power (Organizing without mobilizing creates great friendships; mobilizing without organizing doesn’t build power)

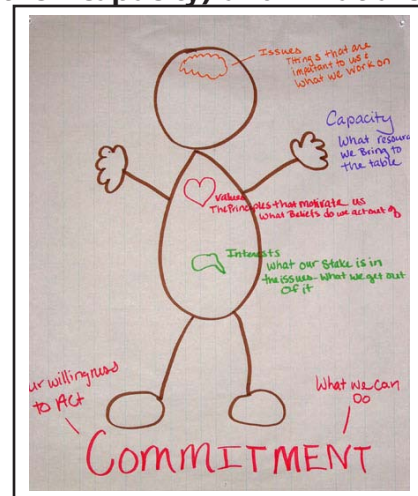
Key Point: Mobilizing is the end result of good organizing.

We cannot effectively mobilize people if we do not know what matters to them and what motivates them. This is the hard and long-term work of good grassroots organizing. The key to both effective mobilizing and organizing is building good relationships.

Transition—“When we talk about relationships in organizing we are talking about intentionally trying to get to know someone and figure out what motivates them—what are the person’s issues, interests and values? What can they do (their capacity) and what are they willing to do (their commitment)?”

IV. Organizing Conversations (:10)

- **Introduce:** “We’ve already said that people (we) only volunteer for something when it matters to us. The trick to good organizing is to figure out ‘what matters’ to the person and then make the link between what we want someone to do (volunteer, doorknock, contribute to COPE) and what matters to them.”
- Use the prepared **Flip Chart** of the stick person: Issues, Interests, Values, Capacity, Commitment.
 - i. **Issues** = the things we work for (e.g. health care; immigration)
 - ii. **Values** = our core beliefs—what we bring to our issues (e.g. social justice, fairness, human rights, etc.)
 - iii. **Interests** = our stake in an issue—why it matters to us (e.g. health insurance because my daughter is disabled or because I believe it is a basic human right; immigration because I want to reunite with my family.)



Note: Often we simply assume that all union people should be concerned about certain issues—without asking them. We assume what their individual interests and values are. It is only by trying to find out “the rest of their story” that we can start making the links between COPE, or our campaign, and what people care about/are concerned about.

- Write two additional terms on the **Flip Chart**
 - i. **Capacity** = what a person can offer (their skills—their time, money, connections. It is important that even when we are raising COPE, we do not see money as the only valid capacity—or even the most important—that a member can offer).
 - ii. **Commitment** = what a person will actually do (their actions).

Note: As organizers we want to find out what skills people bring, and match their skills to our project (e.g. not everyone is good on the phones or going door to door). We also need to assess a person’s commitment to act (e.g. in a union organizing campaign we want to assess a person’s commitment to vote for the union; or in a COPE program how to assess their commitment to taking political action through a contribution).

Key Point: People act (volunteer) when their interest is being met.

People volunteer to act when they see their interest and values at stake in the issue at hand. Good organizers make connections between the campaign and what matters to a person and assess a person’s capacity and commitment to act.

Transition—“We’ve talked about the difference between organizing and mobilizing and the importance of building relationships for each. The key to building these relationships is having real conversations about issues that matter.”

V. Demonstrating a 1:1 Organizing Conversation (:35)

- **Introduce:** “Now we are going to demonstrate and practice this type of organizing conversation. Again, this is a longer conversation that is aimed at building a relationship, getting to know the person and what their issues, interests and values are, with the aim of finding common ground. This may seem straight forward, but often we do not approach members—or each other—with this perspective.”
- **1:1 Conversation Demonstration** (15 minutes)
 - i. This will be done by the facilitator with a participant to model an organizing conversation. The object is to ask lots of questions and get the person to talk. The conversation should take seven to 10 minutes total.
 - ii. **Conversation goals:** Our goal in the conversation is to find out the person’s story—what they do, what they are concerned about, why they do the work they do—in short, to ask questions, listen, and get to know the person. In the process we are interested in assessing what their capacity is and what their commitment is.
- **Note:** need a volunteer. it works best for the demo to have someone you do not know as well.
- **Note:** you may want to use some excuse to start the conversation—e.g. a member census that is structured to find out what members are most concerned about.
- iii. Ask participants to pay attention to the types of questions asked and what kinds of responses they elicit.
- iv. After done, debrief:
 - What did we learn about this person’s issues, values, interest—capacity and commitment?
 - What worked and what didn’t work?
 - What questions were most effective?
- v. Pass out HANDOUT of different questions that can be effective to open up conversations.
 - Where are you from?
 - Do you have kids? Family?
 - What issues are you dealing with at your worksite?
 - What is the most important thing to you in your contract?
 - How long have you worked here?
 - Where did you work before you had this job?
 - Why did you want a job at this worksite?
 - What do you want to do when you retire?
 - Do you think this hospital/agency/company is run well?
 - Do you like working here?
 - What are the big worksite issues you and your co-workers talk about the most?
 - What do you do on the weekends/after work/before your shift?
 - How have things changed since you started your job? For the better or worse? Why?
 - If you could change one thing to make your job/life easier, what would it be?
 - Do you think things are going in the right direction in this country/state?
 - What do you think of politics? Politicians? Why? What experiences have you had that make you think that way (for good or bad)?

- **Practice 1:1 Exercise: Conversations with each other** (20 minutes)
 - i. **Instructions:** For this exercise you will be playing yourself. Pair up with someone that you really don't know that well. For the first five minutes one of you will be the "organizer." Your aim is to find out a person's story, and in the process learn more about their issues, interests, values. After five minutes we will call switch and the other person becomes the "organizer."
 - ii. **Debrief:** For a few minutes debrief what was learned from the conversation/exercise.
 - What did you learn?
 - What questions worked best to open up the conversation?
 - How did the conversation change from when you were the organizer compared to the "organized"?

Key Point: Organizing conversations are intentional conversations with a purpose that are focused on building a relationship.

They may or may not result in an "ask" or commitment from the person. They are meant to get to know the person's issues, interests and values, and assess their capacity and commitment.

Transition—"We've talked about that people volunteer their time, or their money for things that matter to them. As organizers, to effectively motivate them to take an action (or make a contribution) we need to understand their issues and their interest. That's called organizing and requires listening and responding in a genuine way. Now we are going to start focusing specifically on raising money for a political program."

Module 2: Fundamentals of Fund-raising

1. *Flip Chart:* Write the list of different reasons why people give to COPE.

Reasons why people give to COPE

- Ask.
- Attitude.
- Values.
- Politically involved.
- Feels good.
- Buying a service.
- Believe in collective action.
- Like gift rewards.

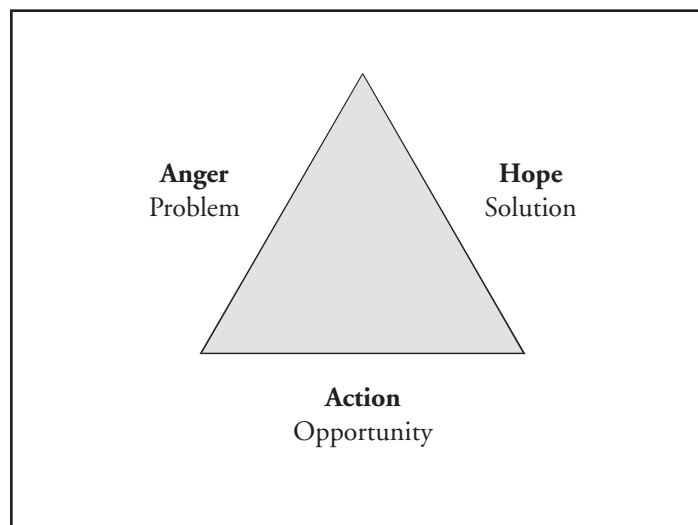
2. *Flip Chart:* Write four key lessons to successful fund-raising (and successful COPE fund-raising).

Key Lessons for Fund-raising

- Being asked by the “right” person
- Being asked at the “right” time
- Being asked a number of times
- Being engaged in ongoing, mutual relationship

3. *Flip Chart:* The diagrams for a mobilizing conversation

Mobilizing conversation



4. *Flip Chart:*

Assessment Scale

- 1 = "with you and get others with you"
- 2 = "inclined to give/support"
- 3 = "undecided, ambivalent or neutral"
- 4 = "do not like or trust the union"
- 5 = "actively oppose the union"

5. *Flip Chart:* Write the six-step COPE Ask. You may want to make one point per flip chart Page.

Sample Approach to a COPE Conversation

- i. Introduction—Why are you having the conversation now?
- ii. Problem/Solution—What does the member care about?
How can COPE help?
Why the urgency?
- iii. Ask/Wait—Make the connection and ask for the contribution.
- iv. Alternative Ask—If not COPE, then what?
- v. Instructions —The different ways to contribute.
- vi. Thank you—This is so important.

Module 2: Fundamentals of Fund-raising

Abbreviated Outline

60 minutes total

I. Why do we contribute? (:05)

- a. How many of you contribute to an organization or cause other than the union or COPE? (How many of you contribute monthly?)
- b. Why did you originally contribute to the organization or cause?

II. Why others contribute to organizations but not to politics? (:15)

- a. Review *[HANDOUT]* on who contributes to organizations—to politics
- b. Why do people contribute to COPE? Why don't they? [brainstorm/discuss] [Flip Chart]
- c. Lessons learned. Summarize reasons. *[Flip Chart]*

III. Making an Effective COPE "Ask" (:40)

- a. Concerns about raising money (:10)
 - How do you feel about raising money? Your greatest concerns or fears?
- b. Mobilizing versus organizing conversations: the mobilizing triangle (:05) [Flip Chart]
 - Anger-Problem
 - Hope-Solution
 - Action-Opportunity
- c. Finding common ground: Interest and capacity (:05)
 - We need to find another person's issues/values/interests to find common ground
- d. Assessing a person's commitment (:10) [Flip Chart]
 - 1 = "with you and get others with you"
 - 2 = "inclined to give/support"
 - 3 = "undecided, ambivalent or neutral"
 - 4 = "do not like or trust the union"
 - 5 = "actively oppose the union"
- e. Making the ask (:10)
 - Review mobilizing triangle
 - Sample approach to a COPE ask [Flip Chart]
 - Introduction— Why are you having the conversation now?
 - Problem/Solution— What does the member care about? How can COPE help? Why the urgency?
 - Ask/Wait— Make the connection and ask for the contribution.
 - **Alternative Ask**—If not COPE, then what?
 - **Instructions**—The different ways to contribute.
 - **Thank you**—This is so important.

Module 2: Fundamentals of Fund-raising

Full Outline

60 minutes total

I. Why do we contribute? (:05)

- **Introduce:** Start with questions similar to those raised at the beginning (ask for brief answers)

- **Why we contribute.**

i. *How many of you contribute to an organization or cause other than COPE?*

Note: have participants raise hands—everyone should be able to answer that they have contributed to something, sometime. *Ask a few participants what they contribute to.*

You should also ask: *How many of you have contributed monthly to an organization or cause other than COPE?*

Note: This is a more realistic comparison to COPE and it will be likely that fewer people do this type of contribution—if time explore why.

- Then ask participants:

i. *Why did you originally contribute to the organization/cause?*

Note: have participants shout out answers and record or have a volunteer record the answers on a **Flip Chart**

Note: Encourage participants to draw on their own experiences. Note their suggestions and how similar they are to why people volunteer. Be sure to include the following:

- interested in the issue/organization/cause
- they were asked—

Note: stress the importance of making a direct ask: specific task, specific date/time

- personal friendships

Note: how many of us have donated to a walk-a-thon, or to the Girl Scouts because a friend or family member asked?

- Chance to win something (prizes, raffle, etc.)
- Because it makes us feel good (and then ask why?)

Key Point: People contribute for many of the same reasons they volunteer—because something matters to them.

Transition—“In order to do successful COPE fund-raising, we need to understand better why people voluntarily contribute money to the union’s political fund. Let’s start by looking at some general statistics about who gives to charity and why.”

II. Overview: Who contributes, why, and what can we learn? (:15)

- **Introduce:** *“Let’s take a look at some statistics as to why people contribute.”*

- **Who contributes:** Give out the HANDOUT. Introduce by saying: *“There is a myth that people don’t contribute. In fact, overwhelmingly people donate money to various causes and organizations, and lower wage earners are more likely to give more as a percentage of their income than wealthier individuals.”* (review the statistics)

i. In the United States, 82 percent of money given away by individuals is given by those with family incomes of less than \$60,000.

- ii. Poor and working class people give more money as a percentage of their income than upper middle class or wealthy people. People with incomes between \$20,000 and \$29,000 contributed 3.9 percent of their income to charity, compared to an average of 2.7 percent for households with an income of more than \$100,000.
- iii. Fifty-three percent of African American households give to charity.
- iv. Almost 63 percent of Hispanic/Latino households give to charity—and this is growing.

Note: We see this in SEIU locals with lower wage workers (home care, child care, property services, etc.) who often have a high percentage of contributors and large contribution amounts compared to their wages.

- **People do not contribute generally to politics.** Although people commonly give to charitable organizations, they do not contribute to political causes.
 - i. Less than 5 percent of all Americans give contributions to political candidates or parties.
 - ii. Less than one-fourth of 1 percent give \$200 or more.
 - iii. 70 percent of Americans of voting age said that they had never given a contribution to *any* political organization.
 - iv. Less than 20 percent of taxpayers check the box to make a \$5 contribution to political campaigns, even though it does not increase their taxes.

Point: *“The point is that people do give—we need to translate it into political giving. The point also is that when we ask a member to donate to COPE we are asking him/her to do something that is rare for most people—to give to politics—which makes it even more important to know what they are concerned about.”*

- **Why do people contribute to COPE?** Why don’t they? Ask the following questions: “Why do people contribute to COPE? Why don’t they?” **Flip Chart** the responses.

Then use and review the prepared **Flip Chart**. Note: this list is really no different from the list of why we contribute. Note: this list can be filled out with specific examples from the particular local union.

- i. **Ask.** They are asked. People who are asked rarely volunteer to give.
- ii. **Attitude.** Positive feelings about their local union (especially their contract, steward, or organizer).
- iii. **Values.** Think their values are reflected by the union and union’s political fund.
- iv. **Politically involved.** Understand the critical need to elect better lawmakers.
- v. **Guilt.** Feel a sense of guilt—they can’t give time, or they feel that they have more money/privilege/support than others.
- vi. **Feels good.** Feel good about themselves (and are recognized) and feel like they are part of something—an insider.
- vii. **Buying a service.** See their contributions in terms of self-interest, that their contributions are essentially a fee-for-service. “If I give to COPE, our union can fight for affordable health care, which my family desperately needs.”
- viii. **Believe in collective action.** Believe that change can only occur through collective action: “I can’t possibly fight for and win affordable health care on my own, so this investment is worth it to me and my kids.”
- ix. **Like gift rewards.** Like the gifts they receive from contributing. This is similar to the fee-for-service notion, above, but also speaks to their need to belong and be recognized. Who has ever said no to another purple T-shirt?
- **Lessons learned:** Use the prepared **Flip Chart** on lessons learned about successful COPE fund-raising, just as other forms of fund-raising boil down to a few key guidelines:
 - i. Being asked by the “right” person
 - ii. Being asked at the “right” time
 - iii. Being asked a number of times and being exposed to COPE as an integral part of the union

- iv. Being engaged in ongoing, mutual relationship-building through conversations with their union organizer, steward, fellow members

Key Point: There is no magic bullet: people contribute to COPE for many reasons. The key is to find out what people care about to connect with. This means building a relationship with the right person who knows the right time (an issue/cause/reason) to make the connection and make the ask.

Transition—“So how do we actually make the ask?”

III. Making an Effective COPE “Ask” (:40)

- **Introduce:** “Asking for money is often hard for people to do.”
- **Concerns about raising money (:10)**

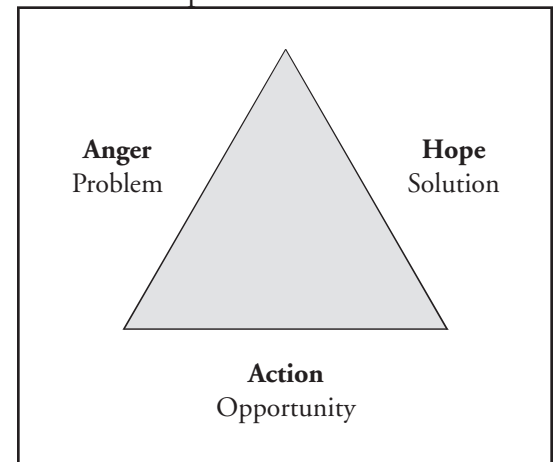
How do you feel about raising money? What does it feel like? Or what are your biggest concerns—fears?

Put the responses on a **Flip Chart**.

Note: This list should be hung up and gone back to as the session develops. Make sure that if during the session all of the points are not addressed to make time to discuss each concern.

Note: This is a critical step for helping people become more comfortable asking for money—to allow legitimate fears to be expressed and discussed as real obstacles that we need to come up with ways around. You may want to share your own story, or unease with fund-raising if it applies. It is also important to note that many of us have no problem asking a person to donate their time (the most valuable resource) because the worst that can happen is that they turn us down—and we do not feel bad about that if they do. Money in our culture is treated differently. Part of getting over the hurdle of asking for money is to start *believing* ourselves that we are giving people an opportunity to participate.

- **Mobilizing versus organizing conversations (:05)**
 - i. Introduce by saying: “A fund-raising ask is a form of a mobilizing conversation except we are asking a person to volunteer their money rather than their time.”
 - iii. Review the **Flip Chart** of mobilizing conversations and its three components:
 - **Anger–Problem.** This gets at what a person’s interest is—what matters to them. For a person to act he/she needs to see a problem that needs to be addressed. The person’s anger or concern or interest about the problem (or issue, or injustice, or anything that impacts their interest or violates one of their values) is the fuel that can motivate someone to act. This is what a good organizer tries to understand by talking with an individual—and does not presume.
 - **Hope–Solution.** People only act when there is hope of solving the problem. Anger without hope becomes cynicism and apathy. Anger with hope can overcome fear (to volunteer, contribute, to act). This is about finding common ground between our campaign (COPE) and what matters to a person. This is inspiration.
 - **Action–Opportunity.** A problem with hope for a solution and an opportunity to act requires an action that is within the interest and ability of the individual (Note: this is a person’s capacity). Action takes commitment to solve the problem. For COPE to be about building power, members need to see their contribution as a way of solving a problem or address an issue that matters to them.



- iv. **Mobilizing conversations build off of organizing.** Review: *“One of the reasons that we started talking about organizing conversations is that relationships built and information learned during these conversations are invaluable for making an effective ask for COPE money. There are two critical forms of information that we need to have to make an effective fund-raising or mobilizing appeal.”*
- The person’s interests and capacity
 - An assessment of the person’s commitment

• **Interest and Capacity (:05)**

- i. Finding common ground. [**Note:** Use examples specific to your local here to illustrate the points.]
- ii. *“We should not presume another person’s interest or issues. We should ask them—and if we do real organizing then we should know them for individual members and co-workers.”*
- iii. *“We also need to understand a person’s capacity. Some people donate, some people volunteer, some people are focused on the contract. All of these are contributions to building union power. Organizers identify what a person is willing to do, then helps build the bridges and understanding that helps a person who does phonebanks see why it is also important to contribute to COPE, or a person who contributes to COPE to see why doorknocking is important.”*
- iv. **Note:** A person who is asked to do something they do not have the capacity to do, or do not see (or fear) their ability to do will say “no.” An important part of building capacity is getting someone to say yes to anything (even handing out a few fliers to coworkers in their workplace) and then building off of that).
- v. **Note:** Use examples specific to your particular local and members.
- vi. **Generic Examples:** Affordable health care for children may be the driving issue for one person; home care for the elderly for another; immigration for another; finding more time to work for the church another.

• **Assessment of Commitment (:10)**

- i. Introduce assessment by drawing parallels between new member and electoral organizing. *“Like external and electoral campaigns, people fall along a spectrum, from those who are most willing and eager to give and enlist others to do so to those who will never give to COPE under any circumstances.”*
- ii. *“Therefore, one of the key elements of a successful organizing conversation is assessment. This is not necessarily, at first, an assessment of their willingness to commit to COPE (COPE may not come up in the first conversation) but an assessment of the person’s commitment to the union, its goals, and its programs. Much of this assessment can be done through effective listening when a worker talks about a question quite different from COPE.”*

Use **Flip Chart** of Assessment Scale (and the HANDOUT). One common assessment scale that organizers often use rates a person on a scale of 1–5.

1 = “with you and willing to get others” Just as in a union organizing drive or electoral campaign. These are often stewards, activists, or folks who are already committed to the union. For COPE, they are the “low-hanging fruit” and the people you will most likely get through a traditional blitz. Typically, there are few “1s” when it comes to political fund-raising, as the data we reviewed earlier makes clear.

2 = “inclined to give/support” These individuals are inclined to support the union, generally feel positive about the union, and see their interests aligned with it. They will also be more inclined to give to COPE (though may take more work = more conversations). These individuals will be more likely to contribute or volunteer the more directly when they see their interest being met and can be developed into 1s by connecting COPE (or some other action) to their direct interest.

3 = “undecided, ambivalent or neutral” These individuals may have both positive and negative or entirely neutral feelings about the union and/or politics. These conversations take a long time. Trust needs to be built around the organizer and member and the member and the union first, before any

ask takes place. A 3 will almost never move to a 1 based on a scripted “rap.” These conversations are about getting to know the person better, answering their questions, respectfully listening to their concerns, providing education that is direct, relevant and not condescending. These people are the heart and soul of long-term organizing, and the fertile ground for building a stronger, more powerful union.

4 = “do not like or trust the union” These members do not “like” the union or their organizer, think their contracts are weak or their dues are already too high. They may disagree with the political work of the union and the candidates the union endorses. They are not merely skeptical or are unclear about COPE, they are generally opposed (the difference between a 3 and a 4). These workers are a lower priority, and will likely never contribute to COPE, although a very important issue or personal experience may politicize the person.

5 = “actively oppose the union” These folks give money to the “right-to-work” committee. Forget about them ever giving to COPE. You will never win them over. Respectfully disagree, and spend time developing 1s and building relationships with 2s and 3s.

- **Making The Ask (:10)**

- i. **Introduce:** It should be clear by now that there is no “magic bullet” to raising COPE money—no perfect script or piece of literature or message that will guarantee a COPE contribution. It is all about building a relationship with the person so they see their interests met through COPE—whatever their interest might be—(*point to the reasons why people contribute list*). This is not to say, however, there is not a model for moving the conversation from your knowledge of a person’s interest to asking them for money. This is what we call “The Ask.”
- ii. Go back to the Mobilizing Triangle and review: anger—hope—solution.
 - **Anger–Problem.** We need to start a conversation about what matters to a person (either by asking them, or better, by reminding them from a previous conversation we had with them)
 - **Hope–Solution.** Then we need to link their concern with hope—trust and a belief that something can be done
 - **Action–Opportunity.** And then finally we need to create an opportunity for the person to act on their hope. It can be contributing to COPE (or it can be volunteering to talk with members at their worksite, doorknocking, or any other type of activity)
- iii. **Sample approach to a COPE ask**

Talk through the main components of the approach to a COPE ask **Flip Chart** prepared before the session began. Note that this conversation is built upon already knowing what the person’s key interest/issue is. Brainstorm possible “asks.”

 - **Introduction**—Why are you having the conversation now?
 - **Problem/Solution**—What does the member care about? How can COPE help? Why the urgency?
 - **Ask/Wait**—Make the connection and ask for the contribution.
 - **Alternative Ask**—If not COPE, then what?
 - **Instructions** —The different ways to contribute.
 - **Thank you**—This is so important.

Key Point: There is no magic script—only an approach that builds a connection between what matters to a person and why contributing to COPE will make a difference. The key is that an issue or concern that a member has little interest in will not make a connection or likely result in a contribution no matter how important the issue may be. Likewise, a connection can be made around an issue or concern that a member really cares about no matter how seemingly insignificant the issue or concern.

Who contributes to organizations?

Who contributes to politics?

People overwhelmingly donate money to various causes and organizations. Lower wage earners are more likely to give more as a percentage of their income than wealthier individuals.

- In the United States, 82 percent of money given away by individuals is given by those with family incomes of less than \$60,000.
- Poor and working class people give more money as a percentage of their income than upper middle class or wealthy people. People with incomes between \$20,000 and \$29,000 contributed 3.9 percent of their income to charity, compared to an average of 2.7 percent for households with an income of more than \$100,000.
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- 70 percent of Americans of voting age said that they had *never* given a contribution to *any* political organization.
- Less than 20 percent of taxpayers check the box to make a \$5 contribution to political campaigns, even though it does not increase their taxes.

Organizing Assessment Scale

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3 = “undecided, ambivalent or neutral” These individuals may have both positive and negative or entirely neutral feelings about the union and/or politics. These conversations take a long time. Trust needs to be built around the organizer and member and the member and the union first, before any ask takes place. A 3 will almost never move to a 1 based on a scripted “rap.” These conversations are about getting to know the person better, answering their questions, respectfully listening to their concerns, providing education that is direct, relevant, and not condescending. These people are the heart and soul of long-term organizing, and the fertile ground for building a stronger, more powerful union.

4 = “do not like or trust the union” These members do not “like” the union or their organizer, think their contracts are weak or their dues are already too high. They may disagree with the political work of the union and the candidates the union endorses. They are not merely skeptical or are unclear about COPE, they are generally opposed (the difference between a 3 and a 4). These workers are a lower priority and will likely never contribute to COPE, although a very important issue or personal experience may politicize the person.

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Module 3: Practicing COPE Conversations and Assessments

60–90 minutes total

I. INTRODUCE EXERCISE (:05)

- **Introduce:** *“This section will be run as a practice simulation. (See attached SIMULATION No.1: ORGANIZING AROUND COPE.) This simulation will practice identifying a person’s key interests and then moving to make a request for COPE.”*

Simulation No. 1: Organizing around COPE

60–90 minutes

Background: As a union, you are committed to building a base of committed activists who will engage in the election in 2006. Your internal goal is to recruit an additional 5 percent of your membership to join COPE and have 3 percent of your members agree to commit at least six hours of volunteer time to work on the union’s electoral program. As part of this effort, you are contacting members at their workplace to talk with each of them about the upcoming fights and about the importance of getting involved. When you practice you will be drawing off your own local experience. You will be talking to members who do not currently belong to COPE.

Exercise:

You will divide into groups of three. One of you will play the role of the organizer; one the role of the participant; one of you will watch. After seven or eight minutes you will be told to switch roles. After another seven or eight minutes you will be asked to switch again. By the end of the exercise, everyone in the group will play both the role of the organizer and as a member.

Organizer Goals:

Your goals as an organizer are threefold:

1. This is an initial conversation so you wish to begin building a relationship that will lead to further activity by the member. Your most important goal is to make sure that it is a quality conversation and that you leave with an understanding of the person’s issues, interest, and values and an assessment of the member’s support of the union, politics, or the political program.
2. Have the member sign up for COPE if they are a 1 or 2.
3. Have the member commit to some other volunteer action if appropriate.

Role play scenarios:

Each participant will be given a slip of paper with a role on it. Do not share this with others in your group—even after the conversation is over. This represents the character you will be playing and your “assessment” (1-5). Feel free to fill in the gaps in your character. Make it as real as possible.

If appropriate, or if you have extra time, you may want to run a few scenarios as fishbowl demonstrations with a pair of volunteers demonstrating a conversation in front of the room followed by discussion. Note: This is an organizing conversation done within the context of a COPE campaign.

- Remind participants that they should pay attention to the following:
 - i. Asking questions to get to know the person better and learn their issues, interest, and values.
 - ii. Make an assessment of whether the person is a 1 or 2, and if a 1 ask for a COPE contribution. If a 2, decide what the best approach should be—asking for a COPE contribution, another volunteer activity, and/or a COPE contribution.
 - iii. Think about how you will approach the person. Oftentimes the opening question or introduction is the hardest.

Debrief exercise (10–15 minutes, or more if time)

- i. Have individual participants report out (or ask specific people to report out) what they learned about the person. What was their assessment of who they talked to. (Have the person say what they actually were.)
- ii. What worked? What were particularly effective questions that opened up the conversation?
 - iii. Ask organizers: What were some of the challenges you faced? Have the “member” or others brainstorm what might have been ways to address the challenge.

Key Point: Identify what matters to a person—make assessment—find common ground and make “ask” if appropriate. Find alternative asks if asking for COPE is not the right approach at first.

Simulation No. 1: Organizing around COPE

60–90 minutes

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You will divide into groups of three. One of you will play the role of the organizer; one the role of the participant; one of you will watch. After seven or eight minutes you will be told to switch roles. After another seven or eight minutes you will be asked to switch again. By the end of the exercise, everyone in the group will play both the role of the organizer and as a member.

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Role play scenarios:

Each participant will be given a slip of paper with a role on it. Do not share this with others in your group—even after the conversation is over. This represents the character you will be playing and your "assessment" (1–5). Feel free to fill in the gaps in your character. Make it as real as possible.

Member Role Scenarios

These should be reproduced and cut into strips with each participant randomly given a character.

You are a "1" You are thankful for your job and are a strong union supporter, attend union meetings. You make little money. You do not particularly like or understand politics. You grew up in a union family and think that the union has generally done a good job for workers. You are generally concerned about what's happening in the state (and think it is going badly) but don't really know the specifics or how it impacts you.

You are a "2" You are disgruntled at work and unhappy about your job, but you think the union generally does a pretty good job for workers. Health care is very important because of a disabled child, and you know that you probably wouldn't have health care if you weren't in a union. You are extremely busy and involved in community groups and with your family (you only have attended union meetings at contract time). You tend to vote Republican because you are pro-life but not an extremist.

You are a "3" You are polite and uninformed. You do not realize that SEIU is your union, although you know you belong to the union because dues are deducted from your paycheck. You don't really like it, but don't really understand it either and think that it is what you have to do to keep your job. You go to church, are an avid sports fan, and love the outdoors. You have a family with children and are taking care of one elderly parent. You think your job is OK, but your passions are mostly outside of work.

You are a "4" You are the person who can find fault in just about everything, have an opinion about everything, and think that just about everything is going wrong—particularly when it comes to politics (and unions). You are independent minded, a very hard worker and very good at your job, and skeptical about the ability to change anything, let alone the government. You think that dues are too high and the union (which you do not know that much about in specifics) has done too little.

You are a "5" You are very polite, smart, conversational and a genuinely nice person, but you have no love for the union. You are a solid Republican because you believe in fiscal responsibility, individual responsibility, and family values. You belong to a number of organizations that are very conservative which routinely endorse candidates other than those backed by the union.

Wrap-Up

1. *Flip Chart*: Be sure to highlight a key point of each section of the lecture as follows (you will refer to this chart at the end of the session to review key points)

Key COPE Summary Points

- People contribute because something matters to them and it meets their interest.
- As organizers we need to listen to find out what that interest is.
- Real power comes through good organizing—as do COPE contributions.
- Organizing builds relationships and identifies common ground.
- Mobilizing motivates people to act on what matters to them.

Wrap-Up

I. WRAP-UP: (:05)

This wrap-up should follow the whole day. If you give the training in sessions, you can modify this wrap up for the specific points that are applicable to the session. Write the major points on a Flip Chart of “Key points” prepared before the session began. Quickly go through each key point as a way of summarizing the session.

Key COPE Summary Points

- People contribute because something matters to them and it meets their interest.
- As organizers we need to listen to find out what that interest is.
- Real power comes through good organizing—as do COPE contributions.
- Organizing builds relationships and identifies common ground.
- Mobilizing motivates people to act on what matters to them.

VIII. Appendices

- a. COPE Political Program Assessment Chart**
- b. COPE Political Program Stages of Development**
- c. Planning a COPE Organizing Program Worksheet**
- d. COPE Fund-raising Plan Worksheet**
- e. Best Practice Examples**

Assessment and Accountability of the Local Union COPE Program

Goals: The following are the goals for assessing, building, and measuring the success of an effective COPE Program.

- Assess current COPE and political program activities and set strategic goals based on the assessment
- Meet overall COPE fund-raising targeted goals
- Build capacity by broadening member leadership
- Strengthen member-to-member communication and COPE recruitment
- Strengthen member education and leadership development

COPE Program Assessment Tools: There are two attached assessment tools. Tool 1 is the *Assessing Our Local Union's Current COPE-Political Program*. It is designed as a way to guide a systematic assessment of your current local COPE program. It can be used in conjunction with other program assessment tools (e.g. the "Discovery" *Capacity Survey Inventory*) or in coordination with a Capacity Team site visit. Tool 2 is the *Stages of COPE Political Program Development*. This grid is designed to further challenge and further enhance local political programs by helping to set goals and priorities that move all political programs toward becoming more and more powerful Power-Building locals. By this we mean having the capacity to meet *both* COPE commitments and have the infrastructure and capacity necessary to move a pro-worker agenda electorally, legislatively, and in the workplace.

COPE Program Accountability Measures: What measures are used to measure success and progress are crucial to the success of the overall program. The following accountability measures are drawn from the SEIU Political Department's *Political Capacity and Infrastructure Form* (see attached). The following key criteria from this form will be collected and monitored by the local and International to assess a local's progress toward its strategic COPE organizing goals. These measures are divided into two categories: COPE Commitment and Building Capacity.

Meeting the Local's COPE Commitment: Key measurements for monitoring a fund-raising program and for making strategic assessments and adjustments to that program.

- Total number of COPE dollars raised/percent of COPE commitment
- Total number of COPE contributors/percent of union membership giving
- Percent of membership on COPE check-off
- Average contribution per COPE contributor

Building the Local's Membership Capacity: Key measurements for monitoring an internal organizing campaign and for making strategic assessments and adjustments to that program.

- Number of worksites mapped/percent of total worksites
- Number of worksites with worksite leaders—contact people—communication structure/percent of total worksites
- Number of MPOs and COPE Captains (or their equivalent)
- Number of member volunteer hours/recruitments (from election tracking form)

Three additional criteria will be collected:

- Number of COPE commitments obtained (broken out by those recruited by members and leaders/by staff)
- Number of member-to-member contacts/staff-to-member contacts (this will depend on current database capacity)
- Number of times members received written communications from union (worksite/mail)

Assessing Our Local Union's Current COPE-Political Program

This grid is designed to be used by the political director and/or area political director as a structured of the local's COPE Program.

Institutional Commitment/Plan	Member Engagement and Capacity	Organizational Infrastructure	Member Communication
<ul style="list-style-type: none"> Is there a <i>trained</i> COPE Committee in place that reflects the breadth of membership? How many times does it meet? What specific roles does it play in developing and implementing the local's COPE/Political plan? Is there a written political plan with concrete goals and benchmarks, including COPE goals? Does it have a timeframe beyond the immediate election cycle? Who is the person designated to hold the union accountable to the plan? Have the principal officers of the local been briefed and endorsed the plan—and when? The E-Board? The staff? How many COPE dollars are currently being raised? How many individual members—percent of local/unit? Average contribution per contributor? Per member? Through what sources and units are the current COPE dollars raised? What is the designated budget for political activities? For raising COPE dollars? What percentage of staff, e-board, and principal officers contribute to COPE? What percentage of stewards contribute to COPE? How many contracts have bargained COPE check-off into the contract—how many members and what percent of the local is covered by those contracts? 	<ul style="list-style-type: none"> In what specific political or other union-related activities are members involved? How many <i>member activists</i> have participated in the following activities in the past six months? How many <i>members</i> can your local <i>count on</i> mobilizing for these events? <ul style="list-style-type: none"> rallies (e.g. contract; GOTV; etc.) phonebanks doorknocks/house visits worksite leafleting political signs in house candidate screenings and endorsement meetings Does a system exist for registering new voters (within the membership)? If so, how does voter registration happen? What percent of members are registered? How many <i>new</i> volunteers in the past six months? How many COPE 3s have turned to 1s? How many <i>members</i> volunteer; how many work “lost time” on political activities? How many <i>members</i> have recruited other members to volunteer/contribute to COPE? Is there a formal system for recognizing member activists and volunteers and developing them into new leaders? How many worksite leaders and staff have been trained in: basic unionism; steward training; basic electoral skills; volunteer recruitment, canvassing, worksite visits; COPE fund-raising; other leadership development? 	<ul style="list-style-type: none"> How many worksites have been mapped/charted? What percent is this of the total number? Is there a data system for tracking where workers actually work and when? Is there a data system and staffing for updating and tracking staff and member-to-member contacts (e.g. door knocks, worksite conversations, COPE contacts, etc.)? Is there a data system that records and tracks member volunteer actions (e.g. volunteering, lawn signs, etc.) and voting history? Can the COPE database track who solicited contributions; the event source for the contribution; as well as maintain a donor history? Is there a political database that has member's broken down by precincts and different electoral districts (e.g. school board, legislative, etc.) and merged with the voter file? Are there staff dedicated to doing political activity and organizing as a principal activity? Are there sufficient support staff to monitor and track data? Do you regularly track member involvement in activities through sign-in sheets at events? Have staff responsible for political work been trained or have significant experience in electoral work? 	<ul style="list-style-type: none"> Is there a functioning worksite communication structure? What percentage of worksites/workers are reached? How many worksite leaders? How many members per worksite leader? What ways do you communicate with workers? How often? What content (contract updates; union news; basic issue education; workplace rights; political elections; etc.)? How many times a month/a year do you use your worksite communication structure to communicate with members? Is there an active “Reach Every Member” program or other regular systems for surveying members about key issues? How is this material used? Are members involved in creating their own outreach and educational materials? Is there a program for training new leaders in electoral skills? Are there sufficient resources and a clear budget to implement effective programs? Is there an ongoing planning and evaluation process that includes assessment of each year's progress, lessons and corrections? Is there a formal process for members to provide feedback to the local's political program?

Local Union COPE Political Program Stages of Development

Note: Locals will be at various stages for different categories. This grid is designed to help target areas for improvement and to set goals and priorities to move increasingly further down the Power-Building path.

	Reacting	Mobilizing	Power-Building
Institutional Commitment and Planning	<ul style="list-style-type: none"> No (or limited) written political plan with strategic goals. No (or limited) COPE plan with targeted goals. No COPE committee or an inactive COPE committee. Little or no formal training of staff and/or members. 	<ul style="list-style-type: none"> Written political and COPE plan. Staff person directed to monitor and be held accountable to plan. Active COPE Committee. No formal broad endorsement or buy-in/participation of plan by principal officers, board, or staff. Staff receive sporadic formal training on specific tasks. 	<ul style="list-style-type: none"> Written political and COPE plan with specific strategic goals (at least for the year). Dedicated staff; active and trained COPE committee representative. Formal broad endorsement or buy-in/participation of plan by principal officers, board, or staff. On-going staff development and training as part of leadership development plan.
Member Engagement and Capacity	<ul style="list-style-type: none"> Relatively limited core activists react when called. Activists mobilized mostly for specific actions—e.g. strikes, rallies, events. Member contact driven centrally by staff and as directive or expectation of external authority. Mobilization/organizing/member contact done by staff 	<ul style="list-style-type: none"> Formal communications structure in worksites Local union effectively mobilizes members regularly for bargaining, political and organizing activities Contacts members as part of a political program with specific electoral messages (e.g. phonebanking; worksite contact; labor neighbor walks). Staff or paid member organizers contact/mobilize membership. 	<ul style="list-style-type: none"> Can regularly mobilize 3–5 percent of membership as volunteers for major union events/electoral activities. Implements a comprehensive member-to-member contact program including multiple and various member contacts. Has ongoing member training and principally contacts members through trained member organizers/volunteers. An active and ongoing member survey program/census (Reach Every Member, or other program).
Member Communication	<ul style="list-style-type: none"> Little regular member communication and/or communication one way from union to members. 	<ul style="list-style-type: none"> Regular communication with members about politics, workplace rights, contracts through multiple forms (worksite, mail, etc.). Communications customized to specific local context/issues. 	<ul style="list-style-type: none"> Regular communication with members about politics, workplace rights, contracts through multiple forms (worksite, mail, etc.). Members are involved in designing appropriate messages and materials for political outreach.
Meeting COPE Commitment	<ul style="list-style-type: none"> Set numerical benchmarks for key COPE Assessment measures. 	<ul style="list-style-type: none"> Set numerical benchmarks for key COPE Assessment measures. 	<ul style="list-style-type: none"> Set numerical benchmarks for key COPE Assessment measures

SEIU Political Capacity and Infrastructure Reporting Form

SEIU LOCAL # LOCAL POLITICAL DIRECTOR

STATE COUNCIL Political Capacity & Infrastructure

	2005 Current	2006	2007	2008	Year End Goal	Program/Talent
WORKSITE STRUCTURE	% mapped					
	% with worksite leaders					
	% members registered					
	# of new members registered in '04					
LISTS	What information is received from employers (computer fields) and how often is it received?					
	Date of last match (State Council will provide)					
VOTER FILE (State Council will provide)	Who maintains voter file?					
	Do you have current statewide file?					
	Official(s) responsible in your state for maintaining voter records					
	Next scheduled match					
RECORDKEEPING	Description of LU's record-keeping for voter registration					
	LU's record-keeping for COPE check-off					
	Does SC have statewide access?					
	# and % of members giving to COPE					
COPE	% of members on check-off					

COPE CONT. MEMBER POLITICAL ORGANIZERS	Average monthly contribution						
	Current number?						
	How defined?						
	Is definition consistent across locals?						
	Recruitment Program?						
	Training Program?						
	How involved is sustained in off-election years?						
	Who manages?						

Note: This form should be used with principal Local Unions in the state in order to compile information for an integrated statewide program. Each LU should have an appropriate model for staff working with our current members so that staff understand their role in ID'ing and mentoring worksite leaders and so there is an ongoing member to member communication program in place with monthly contact. Please attach additional sheet if you need more space.

SEIU LOCAL #:
LOCAL POLITICAL DIRECTOR:

Planning a COPE Organizing Political Program Worksheet

- The grid below is designed to help you systematically think through developing capacity around a member engagement and COPE organizing political program. Working through the grid provides all of the raw information necessary to build an effective organizing plan. The key to success is thinking through the problem and breaking the big task of building capacity and into smaller goals and tasks, then making sure someone is responsible for carrying it out with measurable goals and a deadline.

<p>Overall strategic aim/purpose</p> <p>Be concrete and specific in naming the problem or issue in order to target a solution. i.e. What are the <i>strengths</i> of your existing program that you are building on? What are the <i>weaknesses</i> you are trying to address?</p> <p>A good place to begin is to have a discussion about what are the big issues or challenges that the local will be facing in the upcoming year or two (e.g. a big contract fight, a major legislative issue or political campaign, a major organizing campaign). The <i>Assessing Our Local Union's Current COPE Program</i> sheet can be helpful in identifying areas in your existing program that can be targeted for improvement—e.g. lack of member involvement, etc.</p>	
<p>Overall Strategic Goals</p> <p>Based on the issue or problem that you identified above identify two to five clear goals for your campaign which will be the yardstick for determining success. Make your goals:</p> <p>S = Specific M = Measurable A = Achievable R = Relevant T = Timely</p> <p>Meeting your COPE commitment will likely be only one of your goals. Other specific goals might include: developing a worksite communications structure; developing a database and data tracking system that can track member contacts/conversations and COPE giving, develop a member-to-member rather than staff-to-member COPE program, be able to mobilize 3 percent to 5 percent of the local union's members for specific contract, legislative, or electoral actions.</p> <p>The <i>Local Union COPE Political Program Stages of Development</i> grid may be helpful in identifying and setting specific goals to move your local program more and more toward "power-building."</p>	<p><u>Goal 1:</u></p> <p><u>Goal 2:</u></p> <p><u>Goal 3:</u></p> <p><u>Goal 4:</u></p> <p><u>Goal 5:</u></p>

<p>Current COPE Organizers</p> <p>What people/groups can you already count on to do COPE organizing (e.g. staff organizers, e-board members, member COPE captains, etc.)? These people will likely be the ones who start the program and are the first people who must be engaged in building the program. The aim will be to grow this group, and to move more and more toward a “power-building” member-to-member COPE organizing program. (Be sure that you only include <i>known</i> people that you already can count on, not people you think should support and help out with the program. These people will be identified in the next box.)</p>	
<p>Potential COPE Organizers</p> <p>What specific people/groups of people will you target to develop into COPE organizers (e.g. stewards, COPE captains, officers and e-board members, others)?</p> <p>What will be required to achieve this? Part of the planning process is to identify who else can help out and what they will need (e.g. a personal ask, training, etc.).</p>	
<p>Institutional Buy-in</p> <p><u>Internally:</u> Who within the leadership or the organization needs to have buy-in, make resource decisions or approve plans, or requires additional information or conversations? (e.g. staff, executive board, COPE committee, principal officers, etc.)</p> <p><u>Externally:</u> Who else needs to be engaged—International, regional, others? What specifically can they help provide (e.g. resources, planning assistance, etc.)?</p>	
<p>Obstacles/Challenges</p> <p>What are the key obstacles that you face in meeting your strategic goals listed above (e.g. lack of staff time, no one person in charge of the program, lack of trained organizers, lack of understanding by staff and members of what COPE means and why it is important, etc.)? What are some specific things that you can do to overcome these obstacles?</p>	

Planning a COPE Organizing Political Program Worksheet *continued*

<p>Strategy: Your strategy is the <u>general approach for building the capacity</u> to achieve your goals (e.g. use contract and legislative issue campaign, internal 1:1 organizing campaign, member training/education, etc.).</p> <p>Your strategy comes out of systematically examining your local's:</p> <p>Strengths (<i>build on them</i>) Weaknesses (<i>address them</i>) Opportunities (<i>use them to organize</i>) Threats (<i>use them—neutralize them</i>)</p> <p><u>Note:</u> Don't get hung up trying to figure out how this box differs from other similar questions in this worksheet. The key point here is to have a "big picture" discussion about what broad approaches you will take to achieve your strategic goals.</p>	
<p>Targets Who are the individual members, bargaining units, or types of workers that your program will focus on first to contact, educate, mobilize, <u>or ask</u>:</p> <ul style="list-style-type: none"> • <u>for COPE contributions?</u> • <u>to become worksite leaders?</u> • <u>to serve on the COPE committee?</u> <p><u>Other questions to ask include:</u></p> <ul style="list-style-type: none"> • How will you get their support? • Who is best to make the contact? • Who are your top priorities? <p><u>Note:</u> Try to prioritize and be as specific as possible—not "everyone."</p>	
<p>Key Messages What are you going to say to members about COPE, or about your organizing program?</p> <p>Identify two to five key messages for your campaign. Articulate them clearly and in a language that is accessible to your audience and connects to issues/interests that are relevant and compelling (e.g. a new contract, a big organizing win, a key threat). What is the vision you are communicating? How will it be communicated?</p>	

Activities

Activities are the specific and concrete actions your campaign will do to accomplish your strategic goals listed above. These activities are concrete and measurable, and they become the benchmarks by which you will run your campaign (e.g. make 45 worksite visits in two weeks, identify and train 15 worksite member COPE askers, building COPE into each *specifically named* union communication, have each organizer identify five worksite leaders, map/chart each worksite, develop a new COPE card, etc.)

For each activity you need to decide:

- What are the measurable outcomes?
- Who is responsible for making it happen?
- When will it happen?
- How much will it cost?

Note: this part of the worksheet can be used for brainstorming. The following grid models how this section can be laid out as a plan. **It is in this part of your plan that you would include your specific COPE Fund-raising Plan.**

Infrastructure and Budget

What infrastructure is needed to accomplish the goals and tasks above (e.g. computer database, dedicated staff support, printing, taking photos, tchotchkes, etc.)? Each specific activity and/or goal should have the infrastructure necessary to deliver it.

What is your budget? Likewise, each specific activity/goal should have a budget attached to it (e.g. 10,000 COPE leaflets @ 15 cents, or 15 T-shirts for prizes, etc.).

Sample COPE Organizing Plan

Once all of the information has been filled out using the worksheet, you can begin to draft it into a plan. Below is a model of a planning grid with an example for building worksite communication. Note that this is a step that will lead to COPE fund-raising. Each strategic goal is aligned with the specific activities that will help accomplish that goal. Each activity is assigned a specific person who is responsible, a timeline for when the task should begin/be completed, and the budget and infrastructure necessary to succeed.

<u>Overall Goal</u>	<u>Specific Activities</u>	<u>Responsible Staff</u>	<u>Timeline</u>	<u>Infrastructure</u>	<u>Budget</u>
<p>E.g. Build effective workplace communication structures in 75 percent of all worksites for upcoming contract campaign.</p> <p>(Note: once contract campaign is completed with a successful contract, we will launch a COPE campaign using this same workplace structure.)</p>	<ul style="list-style-type: none"> Map worksite for Mercy Hospital (estimated 30 different work locations). Identify 25 worksite contact people. Develop workplace communications structure. Test communication structure with leaflet on upcoming contract campaign (message: need to address staffing issues). Member-to-member contract survey (structured as a conversation on upcoming issues). Recruit contract newsletter team for contract campaign (make sure COPE is mentioned in all newsletters). Contract campaign launch: develop/deliver newsletter No. 1 	<ul style="list-style-type: none"> Maria Gonzales (Staff Organizer for Mercy) + stewards. Stewards working with Gonzales Maria Gonzales. Maria Gonzales with communications and bargaining team. Workplace contacts—Gonzales and bargaining team. Bargaining team—chair leads. Gonzales; communications staff; bargaining team. 	<ul style="list-style-type: none"> 2/2006–3/2006 2/2006–3/2006 4/10/2006 4/15/2006 4/21/2006–4/28/2006 by 5/1/2006 NL No. 1 complete by 5/10/2006—sent out: 5/12/2006 	<ul style="list-style-type: none"> Plans for hospital Hospital directory—departments. Member list broken down by department if possible. Worksite lists by department/work area Develop and print leaflet Worksite lists by Dept/work area Develop and copy contract survey Develop and print newsletter 	<ul style="list-style-type: none"> \$0 \$0 \$100 Negligible—done internal Negligible—done internal

COPE Organizing Planning Grid

<u>Overall Goal</u>	<u>Specific Activities</u>	<u>Responsible Staff</u>	<u>Timeline</u>	<u>Infrastructure</u>	<u>Budget</u>
Goal 1: (This will likely be your COPE fund-raising plan)					
Goal 2:					
Goal 3:					

COPE FUND-RAISING PLAN WORKSHEET

The following worksheet is designed to help work through setting fund-raising goals from a variety of different sources to meet a specific financial goal. There will be other measures of success that are not addressed here but are discussed elsewhere.

This worksheet can be used in conjunction with the ***Planning a COPE Organizing Political Program Worksheet***.

SETTING YOUR GOALS:

This first section is to give a quick snapshot of what your fund-raising goal is and an estimate of how many new COPE contributors will be needed to reach that goal.

1. What is your COPE Commitment for this year
in total dollars (Number of members X \$ COPE standard per member)? \$ _____
2. How much do you currently raise per year in COPE dollars? \$ _____
3. How many current members contribute annually to COPE? _____
4. What is the average annual contribution (Line 2 ÷ Line 3)? _____

Note: This number will be useful in estimating how many new COPE contributors will be needed to meet your COPE commitment.

5. What percent of members contribute? _____ (Line 3 ÷ Total number of members x 100 = percent members contributing)
6. What is your estimated annual attrition percentage rate, or those givers who stop contributing, or leave the local each year (if unknown estimate 20 percent of total amount raised)? _____
7. What is your estimated revenue loss due to attrition (Line 6 x Line 2)? \$ _____
8. What is the total *additional* amount you need to raise (Line 1 - Line 2 + Line 7)? \$ _____
9. How many new COPE contributors will be needed (Line 8 ÷ Line 4)? _____

IDENTIFYING OPPORTUNITIES TO RAISE COPE DOLLARS

This section is probably the most difficult section because to make a good fund-raising plan you need to spend time thinking about your strategy for raising the money—i.e. what are the variety of sources where you will recruit the new COPE contributors? Some things to think about are: What contract opportunities are out there? What issue or electoral campaigns are out there? What are other ways to ask members?

10. How do you currently recruit new COPE contributors—from which of the following sources? Note: You may not be currently recruiting from many of these sources. Part of the planning process is identifying new opportunities to make COPE asks and to set goals for each. Which of these opportunities will be most fruitful depends on what is happening in the local, the bargaining unit, or current politics.

<u>Current</u>	<u>Future</u>
_____	_____ Reach Every Member Census
_____	_____ Individual worksite one-on-ones—member asks
_____	_____ Individual worksite one-on-ones—organizer asks
_____	_____ Contract ratifications
_____	_____ Lobby Days
_____	_____ Worksite meetings
_____	_____ Stewards' trainings
_____	_____ Stewards' conferences
_____	_____ Local social events (e.g. holiday parties, recognition events)
_____	_____ New member orientations
_____	_____ Candidate interviews
_____	_____ Phonebank Blitzes
_____	_____ Canvass Blitzes (cold calls at home)

11. How much do you expect to raise from each event or type of approach? Note: This will require some thought about what upcoming event opportunities there are and an estimate of how much can realistically be raised—e.g. how many new contributors do you think you can recruit through each source? Not every source will raise money—especially if this is a new approach to COPE dollars.

Each event can then arrive at both a COPE contributor goal and a total dollar goal.

Event/Activity	Responsible Staff	Timeline	New COPE Contributors	\$/members	Total \$ Raised

12. In addition to events—what are the individual recruitment goals for organizers, staff, and leaders?

Note: To be realistic, these goals should be set based on the specific culture and history of the local and will likely be different goals for individual staff and for E-board members and worksite leaders. These individual staff goals should also reflect the other types of activities they are assigned—e.g. doing a Reach Every Member Census or in the midst of a strike, if a bargaining unit is going through a decertification fight, etc. Likewise, not all bargaining units contribute equally because they do not perceive or have as direct an interest and never will.

Individual Staff Members	Responsible Staff	Timeline	New COPE Contributors	\$/members	Total \$ Raised

13. Finally, assign each event a time so you can map out on a chart when you expect to reach the goal and whether you will need to adjust your plan. For example, a Reach Every Member Census might be done in May and June; progress toward individual staff goals might be checked quarterly since sign-ups rarely happen consistently—sometimes at a big contract meeting you will sign up six new COPE contributors and not sign up any for two months.

14. Current COPE contributors targeted to be moved up.

These are the current contributors that you think might be most likely to be able to increase their contribution based on a recent contract, personal interaction, a specific experience, etc.

___(Member)_: target contribution – current contribution × 12 months = new money

RENEWING EXISTING COPE MEMBERS

15. Current COPE contributors targeted for renewal.

If you do not have paycheck deduction or a bank draft, you will need to renew already existing COPE contributors to meet your goal.

NOTE: All of the information gathered on this worksheet can be combined into a COPE Fund-raising Plan (see sample on next page). This plan can be incorporated into your program's overall COPE organizing plan (see the *Planning a COPE Organizing Political Program Worksheet*).

EXAMPLE: BUILDING A FUND-RAISING PLAN

Strategic Goals and Overview.

There are 10,234 members in your local.

You currently raise: \$36,126 from 656 members

- \$55.07 average annual contribution
- \$3.53 per member

Your 2006 COPE goal is: \$54,240 (\$5.30/member)

You expect to lose \$7,225 from attrition (using the 20 percent assumption).

You need to raise \$25,339 more from an estimated 488 new contributors

- 2006 COPE target—Current COPE—Attrition = Additional COPE dollars to raise

Strategy and Targets.

You currently have payroll deduction for COPE. You made the decision to integrate COPE into all aspects of the union. You will launch “a dollar a week” program to urge members to contribute a dollar a week (\$52 per year) to COPE. After analyzing your local’s upcoming year, you decide to target three big events to make a specific COPE ask + a “Reach Every Member Census” campaign.

- A “Reach Every Member Census” campaign
- New member orientations
- Annual Holiday Party
- Lobby Day at the Capitol

These three events and the campaign will be supplemented by individual staff and leader COPE fund-raising goals along with a campaign to identify existing COPE contributors who can be moved to raise their commitment from \$1 a week to \$1.50 a week.

Individual Activities and Goals.

Reach Every Member: You target six bargaining units that are impacted by key legislation and cover about 6,000 members. You estimate that during a Reach Every Member Census that you will reach about 45 percent of the unit, or 2,700 members—1700 by five staff organizers and 1,000 by worksite COPE captains and stewards. The next question that you need to ask is: How many COPE contributors can you expect to get? Target: 150 new COPE contributors from staff (15 percent) and 75 from member leaders (7.5 percent). [Note: This has to be simply a realistic estimation; you might expect somewhere between 4 percent to 20 percent of new COPE contributors from an Member Census based on past experience in different locals depending on the relevance of the issue and the character of the unit.]

New Member Orientation: You also know that about 300 people go through new member orientation each year (this information would need to be gotten from the organizers or the local union president). This is a key way to recruit new COPE members right away. Again, the question is how many can you expect. Target goal: 24 new COPE contributors (8 percent)

Annual Holiday Party: Usually about 400 people show up for the local's holiday party. This year, as part of emphasizing COPE and political engagement, one of the party's themes is recognizing the political heroes of the year. There will also be a COPE sign-up table and recruitment pitch tied to a drawing for prizes (all COPE contributors can place their names in the box). Target goal: 10 new COPE contributors (2.5 percent). Note: the main purpose for this COPE recruitment isn't to recruit new members but to reinforce the importance of COPE overall and give recognition.

Lobby Day at the Capitol: You expect about 200 members to show up for the Lobby Day. You will all be meeting for a briefing beforehand and there will be both a sign-up table (at registration) and a pitch made for COPE at the briefing. Since many of the attendees have likely already contributed, you set a somewhat lower target goal. Target goal: 10 (5 percent).

Individual staff and leader goals: You have nine staff organizers, 18 executive board members, and 15 COPE Captains. Below are the individual goals that are for COPE recruitment over and above the events and the Reach Every Member campaign listed above.

- You split up your goals for staff based on who is doing Reach Every Member, and those staff members who are not. Target goal for the four staff organizers not doing REM: 12 new COPE contributors each; Target goal for the five staff members doing REM (over and above their REM goals): four new COPE contributors each.
- There are 18 E-board members. Target Goal: four new COPE contributors each.
- There are 10 COPE captains for contracts not covered by REM. Target goal: five new COPE contributors each.

Moving Existing COPE contributors up. Every staff member (13 total), Executive Board member (18 total), and COPE captain (25 total) will be asked to identify one existing COPE contributor that they can move up from \$1 a week to \$1.50 a week. Target goal: 56 members moved up.

Summary Grid: COPE Fund-raising Target Goals

Event/Activity	Responsible Staff	Timeline	New COPE Contributors	\$/member	Total \$ Raised
Reach Every Member	Mercy: Organizer 1 St. Francis: Organizer 2 Health West: Organizer 3 Health East: Organizer 4 Partner Clinics: Organizer 5 [Each COPE captain or responsible worksite leader would be listed here].	May–June 2006	Mercy: 23 St. Francis: 18 Health West: 41 Health East: 36 Partner Clinics: 32 [Each clinic would also have member recruitment goals]	\$52 x 150 (staff)= \$52 x 75 (members)=	\$ 7,800 \$ 3,900
New Member Orientations	Staff Director (with staff organizers who speak to orientation).	Ongoing	24	\$52 x 24 =	\$ 1,248
Holiday Party	Political Director; Local President makes pitch	December 7, 2006	10	\$52 x 10 =	\$ 520
Lobby Day at the Capitol	Political Director	March 13, 2006	12	\$52 x 12 =	\$ 624
Staff Goals	Staff Director for: • 5 staff members doing REM; • 4 staff members not doing REM.	Quarterly report (3/30; 6/30; 9/31; 12/31)	• 5 REM staff = 4 @ • 4 other staff = 12 @	• \$52 x 20 = • \$52 x 48 =	\$ 1,040 \$ 2,496
E-Board Goals	Political Director (works with President) for: • [Each 18 e-board member has a goal].	Quarterly report (3/30; 6/30; 9/31; 12/31)	18 E-board = 4 @	\$52 x 72 =	\$3,744
Member organizer goals	Political Director for: • 10 COPE Captains—each would be listed with a goal.	Quarterly report (3/30; 6/30; 9/31; 12/31)	10 COPE Captains = 5 @	\$52 x 50 =	\$2,600
Moving existing up COPE contributors	Political Director for: • 13 total staff; • 18 E-Board members; • 25 COPE Captains.	Quarterly report (3/30; 6/30; 9/31; 12/31)	56 leaders = 1 @	\$26 (50 cents additional per week) x 56 =	\$1,456
			455 new COPE 56 upped	TOTAL	\$25,428

Sample Worksite Structure Plan

Building a Strong Worksite Structure Yields Results

Arthur Towers, Oregon State Council Director

Local 503 did its first census in 2000. In addition to the presidential election, they were facing 26 measures on the ballot, including six serious anti-union measures and one pro-union measure. The local used the census as a tool to educate members about the ballot measures and the candidates and also to clean up their member lists.

Timeline. The local spent May and June of 2000 planning and training worksite leaders and staff to conduct the census. They developed a tool kit for leaders including information about Oregon candidates, the ballot measures (what they say, what they will mean to you), and where the presidential candidates stood on the issues. In July and August, the internal organizers were dedicated to the census as their primary project.

Implementing the census. The local recruited 350 members who were worksite leaders to attend

10 one-on-one trainings around the state. At the trainings there was a two-hour presentation educating members about how public services and their right to have a union were under attack. What can we do about this? Move the census! Staff did one-on-ones with leaders who didn't make it to the meetings.

Worksite leaders received census forms, one sheet per member, with the member's name, address, e-mail, and other contact information printed at the top. It also showed whether the person was a member or an agency fee payer, whether they were registered to vote, and whether they contributed to COPE. The form asked members to pledge to vote the pro-worker way, to volunteer on campaigns, and to contribute to COPE. It asked for worksite information. The forms were sorted by worksite. Worksite leaders also had the binder they got at the training which gave them more confidence when they talked to their co-workers.

Results. Out of 26,000 members, the local got 12,000 forms back and 6,000 people pledged to vote no on the anti-union ballot initiative (so that was 6,000 people they didn't have to call, and an in-person voter ID works better than a phone call.) They got 2,000 new COPE contributors, signed up people who weren't registered to vote, got more than 1,000 fair share people to join the union, and cleaned up the lists. They defeated the anti-union ballot measures and Gore carried Oregon. They also had a tremendous number of volunteers turn out for the fall campaign, although they felt they could have been more systematic about recruitment.

Accountability. Every week for two months the numbers of workers reached, census forms completed, and new COPE contributors were posted on a white board at staff meetings.

Challenges. The census was a major time investment—data/IT time, training time; data entry time, etc. The IT department had to work really hard to set up the census. They hired temps to help with data entry when the forms were returned. The census process also exposed where the local didn't have a worksite structure in place—and organizers had to just do the census themselves.

Lessons learned. The local felt that they should have kept track of who made the ask for each census form received. This would have helped identify new leaders who got involved. Also, having specific maps of the worksites are important to facilitate effective and fast communication with leaders. If the database says "Kaiser Hospital" vs. exact floor, department, location, it may be difficult to find the person you need.

Other uses of member census—for bargaining. In 2002, Local 503 did bargaining surveys that included census information to help clean up member contact information.

Results in 2002. In 2002, Local 503 also collected ballot initiative signatures and they did a much better job tracking how many workers moved petitions than in the first census.

Advantages of a census. The biggest difference between the census and a survey is that in the census, members are interacting with each other. The census form serves as an icebreaker almost —“is this information correct?” Then the conversation goes back and forth about the issues and the candidates. The bargaining survey doesn’t have that back and forth and it takes much longer while the census is just three questions that lead into a discussion.

Advice for other locals.

- Make it about internal organizing along with politics, to increase buy-in of nonpolitical staff.
- Keep the form simple.
- Make sure you include COPE on the form.
- Give the IT people plenty of lead time—in the 2000 census they were given six weeks.
- Rip off what’s working in other locals and don’t be afraid to tailor to different industries.
- Get leader buy-in from the elected leadership, the executive director, the staff director.
- Don’t be afraid to talk about the other institutional benefits: the census helps address the top complaint of members that they never hear from the union because in doing the census you’re talking to members and you can tell them that by cleaning up the list you’re making it more possible for them to hear from you from now on.
- Hold people doing the work accountable.

Staff challenges.

No one likes to have their work quantified, and this is very quantifiable. The census process actually encourages leadership development in the worksite because staff recognize that the more places with strong worksite leaders, the less handholding the staff has to do. If the staff does not have their worksite mapped well, they may end up with a stack of paper and not know what to do.

Regular worksite communication. The local uses its worksite structure to communicate with members about a variety of issues on a regular basis. For example, in June 2003, the local circulated petitions in the worksites around contract negotiations. And they also have a worksite flier system. When they have a “red button” flier—a drop-what-you’re-doing-and-make-your-rounds flier, they can get 26,000 fliers to every worksite in 72 hours. Only a handful have to be mailed. This is used for time-sensitive urgent situations, such as letting members know there’s going to be a strike next week.

Sample Worksite Structure/COPE Census

Lessons in Building a Worksite Structure and COPE Fund-raising

Jon Youngdahl, Director, and Amy Bodnar, Special Projects Coordinator, Minnesota State Council

In Minnesota, all the locals conducted their first census in spring of 2003. They got the best returns when business agents attached bargaining surveys to census forms and got forms completed during discussions with members about what they want in their contract. The program was driven by the elected leaders, and carried out by business agents, stewards, and volunteers.

Through the census process, we were able to:

- Clean up the list.
- Build up the activist list of people willing to do phonebanking and go to rallies. We didn't think we would get many, but more than 100 people signed up to do phonebanking which people often think of as the worst job.
- Raise COPE money as part of a larger goal to build a culture where every time a business agent went out they were asking for COPE contributions. We wanted to go deeper into the organization and get stewards asking. Ultimately, we want to have COPE asks at every meeting—membership sign-up meetings, contract meetings, etc.
- Test worksite structure—we used volunteers instead of lost-timers, to get good feedback on structures in each worksite.

We also plan to do campaigns or blitzes around COPE a couple of times a year. You have to do COPE on a daily basis to get to your goals, but a blitz is like a United Way campaign where for a month you increase the expectations and accountability.

Accountability. In conducting the census, locals faced some resistance from business agents. They felt it added extra work to an already busy workload. We think this response was a first time thing and that people will feel better about it next time because they will have the expectation that this is part of their job. Also, staff were impressed with the results—especially the success in raising COPE funds—so this will motivate them to participate in the next census.

The member census was done purely with volunteers. In the fall 2003 blitz, we'll use paid lost-timers at workplaces where they have trouble reaching people. In July, August, and September 2003, the local staff is committing two to three days to do only COPE. In October 2003, we'll have a one-week blitz where we'll send lost-timers out on COPE and voter registration. We plan to continue that pattern in future years.

Results. The most compelling thing for the locals was to see that the number of forms returned directly corresponded to the increase in COPE contributions for that local. It was remarkable—if you got 14 percent of the forms returned, this matched 14 percent of the annual COPE goal for the local. If 39 percent of the forms were returned, this matched 39 percent of the annual COPE goal for the local. It showed you have to ask for COPE at every meeting and think about it every day. It did begin to change the culture in the locals.

There was one nursing home in northern Minnesota that had issues that required specific legislation. The stewards got really involved and convinced 49 people (not a huge unit) to contribute \$3 per pay period (26 pay periods) basically \$6 per month. The business agent for that facility worked hard preparing the stewards. The majority had attended an October 2002 blitz that SEIU had for Paul Wellstone's re-election and had been to lobby at the state capitol. They saw the connection between their jobs and COPE.

Building worksite structures. Sarah Scanlon, the central region COPE coordinator, has been working with Local 26, a building services local, to build a steward network to be ready for the 2004 political campaign. They started with 20 stewards and in two weeks identified 22 new stewards and 12 additional worksite leaders. They

talked to 737 members in 48 buildings. The initial goal is to get 120 stewards (they currently have 4,500 members). They also just won a huge security officer campaign that will add about 1,500 members.

Local 113 had a major contract campaign that energized members in the Twin Cities hospitals. They held back on the member census during the campaign, but plan to build on the contract network when they do their census this fall.

SEIU members in the school districts (Locals 284, 63, and 26)—with 150 different units—already have a strong structure with one steward for every 55 members. In some places they need additional worksite coordinators so they have a worksite coordinator for each of their buildings.

The goal for every local is to have at most one contact person for every 20 people—that's the maximum that one person can realistically contact at one time. Ten people would be great, but most think that's unrealistic.

Lessons. It's easier to ask for COPE when you have the census survey to go along with it. The members felt they could have a conversation about the questions and that would lead into the COPE rap. This was easier than just going up to someone and asking for \$5.

The locals found that it was better to ask members to contribute to COPE at meetings at the beginning of contract negotiations, when members are optimistic about how bargaining will turn out. At contract ratification meetings, there is always someone who is unhappy or angry that can sway the meeting and make people less willing to give. For some people, it takes three or four times of being asked before they give, although many people do give the first time they're asked.

When staff regularly talk to members about politics and legislation at the worksite, they have more success when they ask for COPE contributions because members are more likely to make the connection between their jobs and politics.

The census is a great tool for locals to do self-evaluation. For Local 26, the census helped them figure out that they needed to build their worksite structure. Where the forms are returned, you see that you have a good steward network, or need other worksite coordinators.

The more involved the members are in an active political program, the easier it is to raise COPE money.

With hundreds of forms going out it was a huge amount of paperwork for the locals to keep up with and it was hard to get information back. The census process really stressed the support staff. But in retrospect, the support staff felt it was worth it because they got more COPE money and they saw it was important for the running of the local to have members' correct addresses and information.

The business agents felt they were always asking the same people to contribute to COPE; the members who go to meetings like contract meetings. The census reached further into the membership to people who don't go to meetings.

Staff. Amy Bodnar from the state council was in charge of coordinating the planning and training for all of the locals and preparation of materials (with assistance from Sarah Scanlon). Amy had meetings with each local union; she went to their staff meetings for the first visit and then on the second visit she did a minitraining for the staff. At the locals, the census was driven by the local president and the political directors developed local plans and carried out the logistics. The business agents carried it out with the stewards. The stewards did it mainly one on one, or as a group at contract meetings.

Next year we will work on building more ownership by the staff and the business agents by bringing all of the business agents from all locals together and doing an intensive training. We may include stewards in the training to help them understand their role better.

Future plans. We will contact everyone who is not a COPE contributor or not listed as registered to vote.

Sample Worksite Communications Structures

Building Worksite Structures for Member Communications

Lisa Williams, Communications Coordinator, District 1199P

I. Building a map of members' ties to the community. In January 2003, District 1199P undertook a Unity Fund project to reach out to every member in an effort to support their organizing campaign in the Allegheny County hospitals. Our plan was to map members' connections to the community. We always chart our members, but only at work. This project was about charting them as whole people, so to speak. The goal was to organize members to make contacts with organizations, churches, and politicians instead of having staff do it. It's more effective if 20 union members who go to the same church approach their clergy about supporting our campaign, than if a staff member from the "union" approaches them for support.

Carrying out the plan. We checked contact information (name, address, phone, e-mail, etc.) and other questions that would be useful to building community support for the campaign. We asked if members had family in the area, what church they go to, what doctors they have, what hospital they use, and if they have any connections to elected officials or community organizations. We asked if members would be willing to be point of contact for the union at work, and give information out to others at work.

The whole staff worked on it full-time for a week, knocking on doors and reaching out to members at work. Where we had a good system at the worksite and members engaged in making it happen, we had the most success. In hospitals where they didn't have an internal structure, they were doing home visits and reached far fewer people. If we had done more work in preparing for the blitz—for instance if we had known what shift members worked—we would have been more successful in reaching members at home.

Ultimately, everyone thought it was something we should do more of—talk to all members, not just those who self-select to be active in the union.

Neal Bisno, organizing director, and Julie Oppenheimer, assistant organizing director, drove the project, and Jane McAlevey was driving the project from the Unity Fund. It was a regional project for all of SEIU, coordinated with other locals (although mainly 1199P staff was involved).

The local gained 300 new potential activists through this project.

Lessons. We learned that we usually rely on a handful of leaders, but there are many more members that are willing to get involved if they are asked. By gathering this information, organizers at nursing homes found new work-area leaders and delegates. Even members who are in departments that are not active in the union, or where there was anti-union sentiment, felt they had an opportunity to share their feelings. They understood that activists and staff were reaching out, and that members would be much stronger with the community behind them. So members were very willing to share personal information with us.

II. Member communications program. The communications program works best when we have a contact person assigned at each facility who is responsible for distribution. We send activists a cover letter with 10 ideas for distributing the flier—leafleting at the time clock, making sure each work area leader has enough for their people, and hand delivering the flier.

Hospitals are more complicated because they often have multiple buildings. We target members who deliver meds or have other jobs that require them to travel around the buildings to do the distribution. A handful of hospitals do chapter newsletters (a leaflet with a lot of different pieces of news), and they may distribute the district's hospital leaflet with their newsletter.

Nursing home chapters are encouraged to do their own issue fliers when things happen, like a labor/management meeting, or when they've won a grievance. They do fliers around issues, rather than a news bulletin.

Training. In January 2003, we began training staff to think about the fliers and leaflets they produce in a new way. We use the SEIU PowerPoint and other materials to stress that the best leaflets are about what members care about, not what the staff or the “union” cares about, and that they are short and distributed at the worksite. So instead of putting out a flier with the headline “Meeting Notice,” we’re encouraging staff to think about what the members care about, like “What do you want to see in your next contract and what are you willing to do to win? Come to a meeting about it.” The training also includes segments on designing a flier using Microsoft Word and on talking to members about distributing it effectively.

We have done this training with all staff by sector (hospitals, nursing homes, statewide health care workers). I follow up with staff at monthly meetings on what stories would be good for publications, how worksite distribution is going, and what kind of communication engages members.

The first real group member training will be in September at the leadership assembly for members who are responsible for producing materials in their facility.

At the nursing home bargaining conference coming up in the fall we’ll do a section on worksite distribution of leaflets, and the importance of doing it one way versus another.

It’s a work in progress. Some chapters are really good at it and some are not sure how to even get a flier out. But we think that practicing it and using our worksite distribution systems frequently will help.

Staff. Everyone understands why it’s better to hand out leaflets at work than mail out a newsletter. I have done training for them on how to produce a leaflet on a computer using Microsoft Word. The key is follow up. A day-long training results in a tiny bit of improvement. So I’m trying to work with individual staff to improve their fliers, to look at them before they go out, and so on.

Staff reaction is mixed. They are very engaged in thinking about what they should be getting out to members in the next month (but turnaround is still a bit long—a month of gathering information, printing, mailing—so we have to think ahead).

PAC/COPE. The local has included PAC (Political Action Solidarity Fund) sign-up in publications but hasn’t gotten much response. Members aren’t signing up for PAC based only on reading a flier. We need to follow up with individuals to get them to actually fill it out and contribute.

We also included a PAC card when members ratified the state contract. We try to connect PAC contributions to things members care about. During the state contract campaign, we prioritized raising money for PAC, building membership involvement, and getting fee payers to sign up as members.

Worksite structure. The worksite structures came about through the District’s Committee to Build

a Stronger Union (CTBSU), formed in 1999. We had a huge amount of growth. The CTBSU recommendations were that each chapter have officers, and enough work-area leaders

and delegates to represent all the members in every department and every shift.

Staff is trained by their supervisors to set up a plan to get each chapter “certified” under the CTBSU recommendations. So far only seven chapters are certified. Certification requirements include 10 percent of members signed up on PAC with a plan to get to 25 percent, a communications structure, a CTBSU-mandated leadership structure, a member organizer and member political organizer, complete worksite charts, and an effective grievance committee, etc. When a chapter is certified, they will get a dues rebate of \$1 per member per month that the chapter can spend however it wants. Some use the dues rebate money to help members with lost time to go to union conferences, training, or to do other union work.

At staff meetings, we check in to set goals for reaching certification at all our chapters.

The staff really sees the benefit because members in certified chapters can run their own union. And that frees staff for the other programs of the union and to work with other chapters that need help. This program was in place before the local started thinking about doing worksite communications.

III. Campaign to enact a provider assessment. We engaged in a campaign to stop nursing home cuts and enact a provider assessment. For a number of weeks the campaign was very intense and we were distributing weekly fliers. Because we already had a communications structure in place for other publications, we could use that same structure to move the campaign information.

We put together a large rally in Harrisburg, Pa., (the state capital) in three weeks. We used fliers to generate participation and bus nursing home workers to the state capitol. At the time, we had just spent three months putting together a big nurses' rally at the capitol and we needed to do the same amount of organizing work in three weeks.

The district met our goals for attendance at the nursing home rally in just three weeks. The result of the campaign thus far: We drove out opposition from a nonprofit nursing home association, which is a big victory. The governor is on our side. The Legislature is on our side, but because the assessment is tied to the budget, it is held up as the Legislature drags its feet on passing the budget.

Advice for other locals.

- The unionwide mandate to use worksite communication to make our union stronger—especially setting standards for the number of elected leaders—is really important.
- Charting the worksites is also very important for staff and member leaders.
- Educate staff and members about how much more effective worksite distribution is, and reminding them that the flier is an opportunity to start a conversation about issues.
- Give staff regular printouts of their membership so they can help chapter leaders keep updated charts and make sure everyone has had a union orientation and signed a membership card.



Tested Principles for Union Political Communication

The ability of union leaders to win for working people in politics depends on the involvement of union members and their families in political action.

If members don't get involved in registering and voting, giving money, and taking part in worksite leafleting, rallies, phone banks, petition drives, and other actions, public officials are less likely to act on union members' priorities.

With focus groups, polling, and other methods, SEIU and the CTW unions have tested methods of communication that increase member participation. That research shows that most members are more likely to support political action if they think it is...

1. **Based on economic and work-related issues that affect members' families**, not on union ties with particular candidates or parties.
2. **Designed to hold all politicians accountable to working people on a year-round basis**, not just to support certain politicians at election time.
3. **Based on the priorities and views of union members**, not just goals of "the union" as an institution.

Here are some tested methods for emphasizing those points in union communications:

Year-round contact. Use worksite leaflets, e-mail alerts, Web Pages, and other tools to encourage discussion between members and stewards or other activists throughout the year on local, state, or federal issues that affect working people. Members who are asked to help win on legislative issues during the year are more likely to get involved at election time. Use your Locals Online Web site's Action Center to put up leaflets that workers can download and pass out at work. Encourage workers to visit the Web site and send letters to hold politicians accountable on issues that matter to working families. Collecting e-mail addresses throughout the year will enable you to communicate with workers during election campaigns.

Integrate COPE and voter registration in the year-round communication program. Members are more likely to contribute to COPE if they understand how the political contribution can help them have a stronger voice on issues that matter to them—their contract, their wages and benefits, legislation that makes a difference in their job, etc. It's also important that asking members to contribute to COPE or asking them to register and vote isn't the only time we talk to them about politics—that leads to cynicism, not involvement. Communicate with members about political action *before and after* asking them to contribute to COPE.

Two-way communication. Provide surveys or tear-off forms and online forms on your Web site for members to give their priorities at the start of legislative cycles. Like surveys in contract campaigns, these show members that union political activities are based on their needs.

At election time, give members a chance to question candidates, and report on the discussion that took place to members who were unable to attend. Your Web site can allow members to send their questions in by e-mail or an online form (a great way to also invite them to update their personal contact information). Member involvement in screening will increase support for candidates the union recommends. Your Web site can report on the candidates' responses and on member participation in campaign activities.

Worker voices. Feature members and their families in news conferences announcing political and legislative goals, contributions, and recommendations of support. In leaflets and other publications and on Web sites, include quotes and photos of members who have chosen to get involved in union political action because of issues they care about. This gives members role models and emphasizes that our goal is to benefit working people, not just “the union.”

Issues up front. Headlines and text of materials or statements and signs at news conferences or rallies should lead not with politicians or union leaders but with issues: jobs, health care, security, quality service.

Factual, nonpartisan tone. Members say they are more likely to open a letter from the union than a brochure that looks like political advertising. All pieces should be clearly marked as “A message from your union about your job” or “Research for you by your union” so members won’t think it comes from a candidate or party. On your Web site, you can create Pages with tables displaying how the candidates stack up. When it comes to election materials, most members say they want factual comparisons of candidates’ records on issues so they can make up their own minds.

- The union’s position on each issue and the effect on members should be included.
- The party affiliation of candidates should not be included, emphasizing that any recommendation is based on issues, not party.
- Comparisons should include at least one bad vote by the recommended candidate and good votes by others. Members don’t believe any politician is all good or bad.
- Unflattering photos of candidates we oppose should be avoided. They make our materials seem too slanted to be believed.
- Web sites or other sources should be cited for the information that is presented. Sources add credibility, even if the reader never looks them up. But don’t just link to the candidates’ Web sites without providing your own information on your site.
- The union’s recommendation should be provided at the bottom, after the factual information it is based on, and not in the main headlines where it will taint the credibility of the comparison that is presented.

It is better to use the word “recommendation,” which clearly leaves to the member the decision about for whom to vote, as opposed to “endorsement,” which to many members has come to mean an instruction determined by union officials.

Keep it short. Leaflets, letters, e-mails, articles, and Web Pages should have few words, large type, and one or two main ideas. Often, the time we have to get a point across is the time it takes for the reader to reach the nearest trash can.

Sample COPE Newsletter Update

Where do the Presidential candidates stand on...

- Affordable, accessible health care?
- Workers' rights?

SEIU members want to know!



SEIU Local 49 member Lucy LaPlante (Kaiser regional call center) asked Presidential candidate Howard Dean tough questions about health care when Dean visited with SEIU members last fall.

The Presidential election will be here sooner than we think. Washington voters have their say in February 2004 and Oregon voters in May 2004. In the meantime, the candidates are talking to voters and taking positions on key issues. Stay tuned for more information from SEIU about where candidates stand on our issues and how you can weigh in.

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member political ACTION

SPRING • SUMMER 2003



member political ACTION

Union janitors tell city council: "No non-union contractors!"



One Source workers spoke up about non-union contractors at the Portland City Council Meeting on May 22.

On May 22, fifteen Local 49 janitors made sure the Portland City Council knew that subcontracting with non-union janitorial companies in the city's parking garages would hurt minority workers and standards for janitors in Portland. Among the janitors in purple "Justice for Janitors" shirts at the city council hearing was **Alejandra Lopez**, a Local 49

member who works for One Source as a Clean & Safe janitor downtown. Alejandra testified before the mayor and city council, along with fellow member **Mike Howard** (ABM) and Local 49 President Alice Dale.

"This was my first time testifying before elected officials," said Alejandra after the meeting. "I urged city leaders to honor SEIU Local 49's Justice for Janitors campaign to improve wages and benefits for Portland janitors. I explained that we will never be able to raise standards if non-union contractors dominate the market. Many non-union workers earn only \$7.8 per hour and have no health insurance."

The Portland City Council granted its contract to a coalition of minority chambers of commerce who plan to subcontract with a currently non-union janitorial firm starting in July. The One Source janitors who work for the current contractor were at the hearing in force, to say that city janitorial contracts should not undermine our efforts to win fair wages and affordable family health care for all Portland janitors.

Local 49 members make politics work at town hall meetings

Several SEIU Local 49 members have participated in town hall meetings with their state legislators to weigh in on protecting basic services like the Oregon Health Plan and Washington's Basic Health Plan, public school funding, and helping reduce health care costs by creating purchasing pools for prescription drugs.

Christine Bird, who works as a Member Intake Specialist at Kaiser Sunset, attended a town hall with her legislator, State Representative Derrick Kitts in Hillsboro. Christine asked her legislators if they supported Oregon Health Plan coverage for full-time workers who cannot afford insurance for their families.

Christine said the town hall meeting was "pretty interesting. I hadn't participated in anything like this before. I brought my daughter along, and she learned a lot, too."

Cindy Goodwin, an ABM custodian in the Evergreen School District, attended a town hall with State Senator

Zarelli in Washington to urge him to vote to protect public education and health care.

Dwain Thomas and **Peter Krug** (Fred Meyer), **Maggie Anderson**, **Marilyn Cloud**, **Carol Gleason**, and **Georgianna Parker** (Kaiser Permanente), and **Carol Burgher** (Columbia Memorial Hospital) have also participated in town halls during the current Oregon and Washington legislative sessions.



Christine Bird, Member Intake Specialist at Kaiser, testified at a town hall meeting in Hillsboro.



[left] Legacy Good Samaritan workers **Emmanuel Kotey**, **Barbara Greiner**, **Tamra Pelton**, **Jon Addis** and **Peter Mark** met with State Representative Mitch Greenlick (D) from left at a legislative town hall meeting. Representative Greenlick pledged to support their efforts to bargain better wages and affordable health care in their upcoming negotiations.

[right] **Gloria Diaz-Zavala** (ABM) met with Congressman David Wu about the Justice for Janitors campaign. The Congressman pledged his support by signing a statement in favor of fair wages and benefits for janitors.

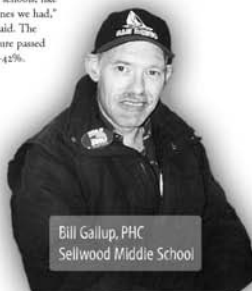


New COPE contributor urges SEIU members to become more politically active

Bill Gallup is a Local 49 member and PHC custodian at Sellwood Middle School. Bill has been active for many years in local politics and elections as Precinct Committee Chair, and now he is the most recent member of Local 49's political committee and a new voluntary contributor to COPE.

"SEIU members need to be more active in the political process," Bill explained. "We need to put our voice, out issues, out in the public. That's why I signed up to be a COPE contributor." Bill also volunteered with Local 49 to help pass Measure 26-48 in Multnomah County to restore basic services like a full school year for our kids, health care for seniors, and public safety.

"I volunteered to help pass this measure because kids shouldn't be losing their education. Kids deserve good schools, like the ones we had," Bill said. The measure passed 59%-41%.



Bill Gallup, PHC
Sellwood Middle School

Making our voices heard new COPE contributors

ABM
Reyna French
Bryan Leeder
David Griffin

Good Samaritan Regional Medical Center
Karen Burnett
Melinda Huddleston
Anita Hilton
Joe Purny
Barbara Smith

Kaiser Permanente Cascade Park Medical
Larinda Rogan

Kaiser Permanente Mother Joseph Plaza
Lisa Sprecher

Kaiser Permanente North Interstate
Joy Gimocchio

Kaiser Permanente Regional Call Center
Michael Grigby
Laronda Hovis
Lorri Titus

Kaiser Permanente Salmon Creek
Misha Fussell

Kaiser Permanente South Interstate
Ronald Johnson

Kaiser Permanente Sunnyside Medical Center
Rosemaria French
Anita Hancor
Susanna Ying
Abigail Berman
Jessica Manson
Melissa Northrop

Kaiser Permanente Vancouver Medical
Brandy McGee

Orowest Bakery
Doug Martindell

Samaritan Pacific Community Hospital
Tina Evans
Leslie Keldi

St. John Peacehealth Hospital
Donna Iverson
Cassie Winters

Portland Habilitation Center
Gladys Adams
Abdirizak Aden
Alemnesh Bote
Dweyee Diahn
Shewaye Faye
Bill Gallup
Rickey Grady
Dan Haynes
Nathaniel Kerkuloh
Kevin Koch
Keith McDaniel
Pablo Miranda
Sharon Neal
Chinh Minh Nguyen
Anthony Olsen
Commonwealth Scott
Tran Can Thanh
John Tran
Elmer Wilson
Orna Yoseph
Steve Nealeigh
William Beckert
Joe Clayton
Charles James
Audrey James
Debra Leonard
Jeremy Treb-Pollock
Jeffrey Ray Whitwell
Shawn Wright

ACTION ALERT

Call your legislator to save our health plans!

As many as 150,000 Oregonians and 60,000 Washingtonians could lose their health insurance coverage as our state legislators cut vital public services to balance the state budgets.

Call your legislators and urge them to protect the Oregon Health Plan and Washington's Basic Health Plan from massive budget cuts today!

Oregon residents:
Call 1.800.332.2313

Washington residents:
Call 1.800.562.6000

Tips for Reaching Home Health Care Workers

Introduction

Even in the best of circumstances, maintaining an accurate membership list is hard work.

Home care locals face particularly difficult challenges:

- Because home care workers have a very demanding job and get paid relatively little, most locals report 40 percent to 50 percent of their members leave the local and the industry every year.
- Even when members do stay with the union, it's often hard to get their most current phone number and address.
- Because of their low pay, members change address and phone number—or have their phone number temporarily disconnected due to problems keeping up with bills—relatively frequently.
- When members give their contact information to their employer, they often give the address of the person for whom they are caring; so locals often don't have their home address.
- Locals can't rely on help from members who work at the same worksite because members don't work together in a factory or an office, they work by themselves in their client's home.

Given these challenges, what can a home care local that wants to mobilize its members for politics or organizing do to increase the odds of success? The best place to look for answers is in the experience and ideas of other home care locals.

The following is a list of strategies that home care locals have used or are considering using to maintain an accurate membership list. We have listed the locals that tried these approaches so that you can contact them if you want more details or need help strategizing about how to fit their approach to your particular situation. These tips were contributed by Mary Ruth Gross of SEIU Local 250; Karla Spence and Lisa Segal of SEIU Local 503; Arthur Towers of the Oregon State Council; Myriarn Escamilla of SEIU Local 715; Adam Glickman, Laura Southard, Candace Inagi of SEIU Local 775; Mila Thomas and Karen Orlando of SEIU Local 616; Keith Kelleher of SEIU Local 880; Tyrone Freeman and Dereck Smith of SEIU Local 434B; and Aida Garcia and Norvelin Pichardo of SEIU Local 1199NY.

Getting Updated Contact Information from Members

The best way to get the most up-to-date contact information about members is from members themselves. But for home care locals this is hard to accomplish. Therefore, some of the standard SEIU techniques for getting information from members have to be modified to fit the unique circumstances of home care members.

For example, stewards and member-to-member contact are a good way to get a member's information. Since home care workers work at a worksite of one, home care locals have tried several strategies for solving this problem:

- Local 250 has developed a network of members who act as surrogate stewards for a particular town or neighborhood, although they are not called stewards because many members don't want that much responsibility.
- On an as-needed basis, 1199NY breaks down its membership by ZIP Code and assigns organizers to them.
- Local 503 has used phone trees organized by House districts, which have worked to varying degrees. The most successful efforts occurred in districts that had a large number of member activists with a strong sense of group identity.
- Local 503 is also trying an experiment in which new home care members in a particular county are sent a letter welcoming them to the union and giving them a list of activists in their area if they have questions or want to get more involved.

Membership meetings are another great place to get the most current contact information about members—but only if enough members show up for meetings. This is why Local 1199NY, 880 and 250 phone their members about meetings.

Another way to update information is to have staff or volunteers contact members by phone. Since most home care locals tend to have inaccurate phone lists, Local 775 found that using a vendor to do a phone match before making calls can make a real difference. If done in a limited way, phone matches are affordable; Local 775 usually spends about \$250 to match new names.

Most home care locals have not found that mailing members is an effective way of getting updated information. For example, Local 503 ran an experiment in which they sent members postcards asking them to tell the union if their phone number had changed. This effort met with limited success—they didn't get many cards back.

Ultimately, to make real headway many locals try to use every contact they have with a member as a chance to get updated information. They have found that whenever their staff talks to members, whether it's when you visit them or when your members call the office, your staff always ask members to confirm whether the union has their correct address and phone number.

Getting Information from the State

Since home care workers are paid by the state government, the state can also be an important source of information about members.

Most locals have been able to get states to send them information electronically, which has been a real advantage. Some locals have gone so far as to help the state develop a good database program so they are able to get the locals the information they need.

But state information is not a panacea. If the state sends you an address or phone number that differs from what is in your membership database, which data do you keep? Local 250 always uses state data because they are confident that it is reasonably accurate, in part because their successes in increasing member wages and benefits has significantly reduced turnover. In contrast, Local 503 has found Oregon state data is not as accurate as they would like, and the more they collect data from members through internal organizing, the less they use state data. Local 775 only uses state data when they are adding new people.

The one area in which all locals rely heavily on the state for information is keeping track of when a new or returning member starts working and when members leave their job. No matter what information a local gets from the state, they will never have a completely accurate count of their membership: either they won't find all new or returning members as soon as they begin working, or they will have people still listed as members when they have already left their job. But locals can significantly improve the accuracy of the information they get from the state by negotiating to get both how many hours a member worked and how many hours they were authorized to work. Because of the billing process, hours worked will always lag behind reality. But if someone new is authorized to work a certain number of hours, this information will show up in the state's database right away.

Managing Your Membership Database

Just as important as how you get information about your members is how you manage the information. Because turnover in the industry is relatively high, there are several issues you need to decide when setting up your membership database.

One of the most important issues you'll need to decide is, how long should you keep a member in the database so you can contact them? Most SEIU locals do not keep track of people who are no longer members. But in the home care sector, workers tend to drop in and out of the industry. For example, Local 503 found that 30 to 40

people come back every month who worked in home care in the last six months. As a result, most locals keep mailing people who were members up until six months ago.

At some point, however, it no longer makes sense to keep a member's information in your membership database. If you do not eventually remove the information, your membership database will become too large to support. Most locals found that one year is a good cutoff, because people who haven't been members for a year or more are highly unlikely to rejoin the local. Two important exceptions are Local 434B, which has found it useful to keep inactive members in their database for two years and then archive them, and 1199NY, which keeps inactive members in their main database for only six months and then archives them.

The other issue you will need to consider is who should have access to the membership database and who should be able to modify it. Most locals give organizers the ability to view information about members in the database. But most strictly restrict who can change the data to reduce the number of typos, etc. In Locals 250 and 1199NY, reps pass changes on to administrative staff. In Local 503, they can add notes to the notes field. In Locals 775 and 880, organizing staff can look up names, but they cannot change the data.

Mobilizing for Politics

Most SEIU locals focus their energy on mobilizing their members for politics. But given the high turnover in the home care industry, it may be worthwhile for home care locals to treat former members as community allies. Former members are likely to vote for home care and health care policies that SEIU locals advocate. And since low-wage workers, particularly low-wage minority female workers, are rarely targeted by political parties, an effort to mobilize former members could bring people into the political process whose voice is otherwise ignored.

Some locals, such as 1199NY and 880, have formed retiree groups whose members are active in politics. At this point, no locals have tried to systematically incorporate former members who aren't retirees into their efforts to build community allies. Local 880 has found that a significant number of former members still show up at meetings (largely because they are interested in becoming members again in the future). The Oregon State Council is considering an experiment to systematically involve former members.

Conclusion

For home care locals, keeping an accurate membership list isn't easy. But when SEIU locals first began organizing home care workers many years ago, they faced what many considered to be impossible odds. Both society and the labor movement had essentially written off these workers. SEIU led the way, helping the people who take care of some of the most vulnerable members of our society to have a real say in how they are treated on the job. Ensuring that these members' voices are still heard is a difficult challenge. But by learning from each other's experience and ideas, we can make a real difference.

Sample Member Census Cards/Surveys

Local 113

SEIU LOCAL 113 MEMBERSHIP CENSUS - MARCH 2003

Agent Joe Rep

Facility: North Hospital

ID #: 222-333-1111

Member Information (Please review the data below and make changes as needed)

Last: **Smith**

First: **Joe**

Home Phone: **(555)123-4567**

Address: **1111 First St.**

Apt. **1**

City: **Minnie**

State: **Minnesota**

Zip: **12345**

E-mail: **smithj@whatsittoya.org**

Job: **CNA**

Reg. At Current Add.: **yes**

Current COPE contributor: **yes**

1. Organizing: Our ability to negotiate decent wage increases and benefits for our members depends upon our overall strength as a Union and as a Labor Movement. This means continually organizing new workers into our union to raise the standard of living for all of us. Would you be willing to be on a member organizing committee to talk with non-union workers on the value of joining the Union?

☐ Yes ☐ No

2. Health Care Benefits: Our health care benefits are constantly under attack. Would you be willing to join other union members in an action that would work to make people aware of the problems we have maintaining affordable medical benefits?

☐ Yes ☐ No

3. Electing Pro-Worker Candidates: Elected officials set the budgets that determine the level of our services, wages and benefits. It is critical that we elect pro-working family candidates to office. Will you assist by working on:

☐ Phone Banks ☐ Rallies or Literature Drops

4. Talking to Elected Officials: Would you be willing to meet with local elected officials to discuss your concerns as a health care worker?

☐ Yes ☐ No

Committee on Political Education (COPE)

This is how your voice gets heard!

Current COPE Contributor:

Steward:

☐ \$8.00 per bi-weekly pay period ☐ \$5.00 per bi-weekly pay period ☐ \$3.00-per bi-weekly pay period

☐ Other _____ per bi-weekly pay period

For financial contributions to member-endorsed candidates for Local, Legislative and Statewide offices. I hereby request my employer to deduct the above amount from my monthly earnings, and remit that amount on my behalf to my Union - SEIU Local 113. This amount is to be a continuing monthly deduction and can only be terminated by my written notice.

FULL NAME (PLEASE PRINT)

ADDRESS

SIGNATURE

FACILITY

making of these voluntary contributions are not a condition of membership in the Union nor of employment with any employer. You may contribute any amount, and will not be favored or disadvantaged by the union for doing so. You may refuse to contribute without reprisal. SEIU COPE is a program of the Service Employees International Union and the money it receives is used for political expenditures, including contributions in connection with federal, state and local elections. SEIU COPE contributions are not deductible as charitable contributions for federal income tax purposes.

Sample Member Census Cards/Surveys

Generic Survey

What Affects You and YOUR FUTURE?

Your future could be affected by the outcome of the upcoming elections for US president and other offices.

That's why our union plans to provide members with facts about the candidates' track records on key issues that affect working families. Please help by marking the issues that are most important to you.



The issues that matter most to me are...

Please put a check beside your top two issues.

- | | |
|---|--|
| <input type="checkbox"/> Affordable Health Care | <input type="checkbox"/> Reliable Public Services |
| <input type="checkbox"/> Quality Education | <input type="checkbox"/> Good Jobs and a Healthy Economy |
| <input type="checkbox"/> Strong Unions and Workplace Rights | <input type="checkbox"/> Safe Staffing |
| <input type="checkbox"/> Immigration Reform That Rewards Work | <input type="checkbox"/> Comments: _____ |

To make progress on issues like these, SEIU members must join together and all do our part.

- | | |
|--|---|
| <input type="checkbox"/> I will register to vote. | <input type="checkbox"/> I am already registered to vote. |
| <input type="checkbox"/> I will contribute to our union's political action fund. | <input type="checkbox"/> I already contribute. |

Voter registration and political contribution forms are available from:

NAME _____ PHONE () _____

I am interested in more information on:

- | | |
|---|---|
| <input type="checkbox"/> My contract and rights on the job. | <input type="checkbox"/> Upcoming training opportunities. |
| <input type="checkbox"/> How I can get more involved in union activities. | |

HERE'S HOW TO KEEP ME INFORMED

Place Member Mailing Label Here.

- ☐ My contact information is up-to-date.

If any of your contact information is missing or incorrect, please fill in this form.

NAME _____ PHONE () _____ EMAIL _____

JOB TITLE _____ EMPLOYER _____ DEPARTMENT _____ SHIFT _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

PLEASE RETURN THIS FORM TO _____

Sample Member Census Cards/Surveys

Local 113 New Member Orientation

New Member Orientation Organizing Survey

Name _____ Home Ph _____

1. Were you employed in any other hospitals, nursing homes, clinics, or home care agencies in Central or Western New York? (Circle all that apply)

- a) Hospital d) Home Care Agency
b) Nursing Home e) No, this is my first job in health care
c) Clinic

2. Where did you work? When did you work there?

Previous Health Care Employer

Dates Employed

3. Do you know employees who work for **non-union** health care facilities/companies? Who do you know, where do they work and how do you know them (e.g., relatives, neighbors, friends, former co-workers, etc)?

Name

Workplace

Phone #

How you know them

A. _____

B. _____

C. _____

D. _____

(If you need more space, please use the other side of this survey.)

4. Do you have a spouse, partner, family member or friend who works for a non-union company that is **not** health care?

Name: _____ Company: _____

Sample COPE Cards/Leaflets

Local 49—Check-off/Bank Draft (front)

Checkoff

When workers unite, politicians listen

SEIU Local 49 members are sending a message to our elected officials: **Working families need affordable health care.** Our members have enlisted the support of local, state and federal elected officials to win better contracts with living wages, affordable health care benefits, and improved workplace safety protections. All this political support is made possible by COPE—our union's issue-based, member-driven political program. **Sign up here to make voluntary contributions to the COPE fund, to make sure our elected officials keep listening.**



Return completed form to:
SEIU Local 49 • 3536 SE 26th Ave.
Portland, OR 97202 • Fax: 503.238.6692

I authorize my employer to deduct [select one] ☐ \$4.16 or ☐ \$8.32 per month from my pay and forward that amount to the SEIU Local 49 COPE Fund for SEIU COPE.

I understand that 1) I am not required to sign this form or make COPE contributions as a condition of my employment by my employer or membership in the union; 2) I may choose not to contribute without any reprisal; 3) only SEIU members and union executive/administrative staff and only US citizens or legal permanent residents are eligible to contribute to SEIU COPE; 4) the amounts on this form are suggestions, and I may contribute more or less by other means without fear of favor or disadvantage from my employer or the union; 5) SEIU COPE uses the money for political purposes, including but not limited to, addressing political issues that impact working families and by contributing to and spending money in connection with federal, state and local elections. Contributions to SEIU COPE are not deductible for federal income tax purposes. This authorization shall remain in effect until discontinued in writing by me. My signature on this form shows that I have read and agree with these terms.

NAME [PRINT]

DATE

SIGNATURE

EMPLOYER

JOB TITLE

Bank Draft

When workers unite, politicians listen

SEIU Local 49 members are sending a message to our elected officials: **Working families need affordable health care.** Our members have enlisted the support of local, state and federal elected officials to win better contracts with living wages, affordable health care benefits, and improved workplace safety protections. All this political support is made possible by COPE—our union's issue-based, member-driven political program. **Sign up here to make voluntary contributions to the COPE fund, to make sure our elected officials keep listening.**



Return completed form to:
SEIU Local 49 • 3536 SE 26th Ave.
Portland, OR 97202 • Fax: 503.238.6692

I authorize the SEIU Local 49 COPE Fund to debit [select one] ☐ \$4.16 or ☐ \$8.32 / month and adjustments for any entries in error to my [check one] ☐ checking or ☐ savings account for SEIU COPE and for my bank to debit entries to the SEIU Local 49 COPE Fund.

I understand that 1) I am not required to sign this form or make COPE contributions as a condition of my employment by my employer or membership in the union; 2) I may choose not to contribute without any reprisal; 3) only SEIU members and union executive/administrative staff and only US citizens or legal permanent residents are eligible to contribute to SEIU COPE; 4) the amounts on this form are suggestions, and I may contribute more or less by other means without fear of favor or disadvantage from my employer or the union; 5) SEIU COPE uses the money for political purposes, including but not limited to, addressing political issues that impact working families and by contributing to and spending money in connection with federal, state and local elections; 6) Contributions to SEIU COPE are not deductible for federal income tax purposes. This authorization shall remain in effect until discontinued in writing by me, allowing SEIU Local 49 and my bank a reasonable time to act on it. My signature on this form shows that I have read and agree with these terms.

NAME [PRINT]

DATE

SIGNATURE

EMPLOYER

JOB TITLE

ATTACH A VOIDED CHECK OR A SAVINGS ACCOUNT DEPOSIT SLIP HERE

Sample COPE Cards/Leaflets

Local 49—Check-off/Bank Draft (back)

Which COPE form should I fill out? • ¿Cuál forma de COPE debería usar?

CHECK-OFF

If you work for one of the companies listed below, use the CHECK-OFF form [the top form on the back side of this page]

ABM: Janitors & Windows
ABM Schools: Ridgefield & Evergreen
Aramark / OSU
B&L Janitorial
BOMA
Coast Janitorial
Dependable Bldg Maint
Down Manor
Everclean Bldg Maint
Freightliner
Kaiser Permanente
Manor Management: Kirkland, Vancouver, Marshall, Westmore, Alberta Simmon, Summer, YaPoAh
NW Facilities Management
Onesource
Oroweat
Portland Habilitation Center

Reed College
Servicemaster
Skyline Bldg Maint
Somers
State Bldg Maintenance
TECOM
UA Local 290
US Bakery/Franz

BANK DRAFT

If you work for one of the companies listed below, use the BANK DRAFT form [the bottom form on the back side of this page]

Albany General Hospital
Columbia Memorial Hospital
Cowlitz County
Crosby
Dependable / Trojan
Fred Meyer
Legacy Emanuel Hospital
Legacy Good Samaritan Hospital
McKenzie Willamette Hospital
Mid-Columbia Manor
Multnomah Greyhound Park
Samaritan Pacific Community Hospital
St. John Peacehealth Hospital

ESPAÑOL

Si Usted habla español, llene la forma abajo, en esta hoja.

Español

Cuando nos unimos, los políticos nos escuchan



Devuelva este formulario a:
SEIU Local 49 • 3536 SE 26th Ave.
Portland, OR 97202 • Fax: 503.238.6692

En nuestra campaña por el contrato de 2003, mandamos un mensaje a nuestros oficiales públicos: **Los janitors necesitamos seguridad alcanzable.** ¡Y nos escucharon! Oficiales públicos de la ciudad, del condado, del estado, y del nivel federal presionaron a los contratistas de limpieza para ayudar a ganar nuestro mejor contrato que nunca. El apoyo político fue hecho posible por COPE—el programa político de nuestra unión. **Apúntese aquí para hacer contribuciones voluntarias al fondo COPE para asegurar que los oficiales públicos sigan escuchando.**

Autorizo a mi empleador a rebajar ☐ \$4.16 o ☐ \$8.32 por mes de mi cheque, y enviárselo al fondo **SEIU Local 49 COPE Fund.**

Entiendo que 1) no tengo que ni firmar esta forma ni hacer contribuciones a COPE como condición de mi empleo ni de mi membresía en la unión; 2) puedo escoger no contribuir sin represalia ninguna; 3) solamente miembros y personal de SEIU y solamente ciudadanos o residentes permanentes de los EEUU pueden hacer contribuciones a SEIU COPE; 4) las cantidades en esta forma son sugerencias, y puedo contribuir más o menos por otra forma sin temor ni de favor ni de desventaja de mi empleador ni de la unión; 5) SEIU COPE usa el dinero por asuntos políticos, incluso pero no limitado a, asuntos políticos que afectan a familias trabajadoras y el contribuir y gastar dinero en conexión con elecciones locales, estatales, y federales. Contribuciones a SEIU COPE no son deducibles de mis impuestos federales. Esta autorización quedará en efecto hasta que yo la termine por escrito. Mi firma en esta forma afirma que he leído y estoy de acuerdo con estos términos.

NOMBRE [LETRA DE MOLDE]

FECHA

FIRMA

EMPLEADOR

Sample COPE Cards/Leaflets

Minnesota State Council (side 1)

Help Working Families Gain a Stronger Voice Contribute to SEIU's Committee on Political Education (COPE)

*I am volunteering to contribute to the SEIU Committee on Political Education (COPE)
to help make elected officials stand up for working people.*

I authorize my local union to file this payroll deduction with my employer and for my employer to forward the amount specified to SEIU COPE.

I understand that: (1) I am not required to sign this form or make COPE contributions as a condition of my employment by my employer or membership in the union; (2) I may refuse to contribute without any reprisal; (3) Only union members and executive/administrative staff who are U.S. citizens or lawful permanent residents are eligible to contribute to SEIU COPE; (4) The amounts on this form are merely a suggestion, and I may contribute more or less by this or some other means without fear of

favor or disadvantage from the union or my employer; (5) SEIU COPE uses the money it receives for political purposes, including but not limited to addressing political issues of public importance and contributing to and spending money in connection with federal, state and local elections.

Contributions to SEIU COPE are not deductible for federal income tax purposes. This authorization shall remain in effect until revoked in writing by me.

Please sign the reverse side of this card to indicate that you have read and agree with these terms.

SEIU MINNESOTA STATE COUNCIL
233 University Ave W #422
St. Paul MN 55114-1629
612-203-0401

SEIU LOCAL 26
312 Central Ave #356
Minneapolis MN 55414
612-331-8336

SEIU LOCAL 113
675 Stinson Blvd. #200
Minneapolis MN 55413
612-331-4690

SEIU LOCAL 63
3227 Halglo Place
Minneapolis MN 55422
612-408-1981

SEIU LOCAL 284
450 Southview Blvd
So. St. Paul, MN 55075
651-256-9100



**Frank Dehner, Bus Driver - West Saint Paul
SEIU Local 284**

"The average person just can't keep up with the latest on nursing home and home care funding, Medicare and Medicaid reimbursement rates, and changes to state medical programs and private health insurance. COPE helps us elect pro-worker candidates so that health care is a higher priority on every elected officials agenda."



Belinda Hermann, Building Cleaner, SEIU Local 26

"A school employees, we have to pay attention to politics at all levels of government, including the local school boards. Contributions to COPE ensure that we have up-to-date information and all the facts so that SEIU members can get involved in the political process."



**Frank Miskowicz, Maintenance Engineer - Mpls.
Public Schools, SEIU Local 63**

"I love the fact that my union is willing to stand up for workers. COPE means that the voices of many will be heard. It also translates into political action by our members so that we can speak for ourselves."

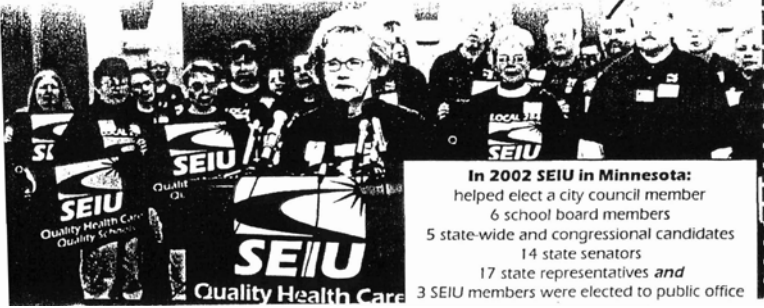


"Now, more than ever, it seems that the average worker has been under attack at the State Legislature and in Congress. My COPE contributions help get the word out so that our elected officials know what is important to public employees."



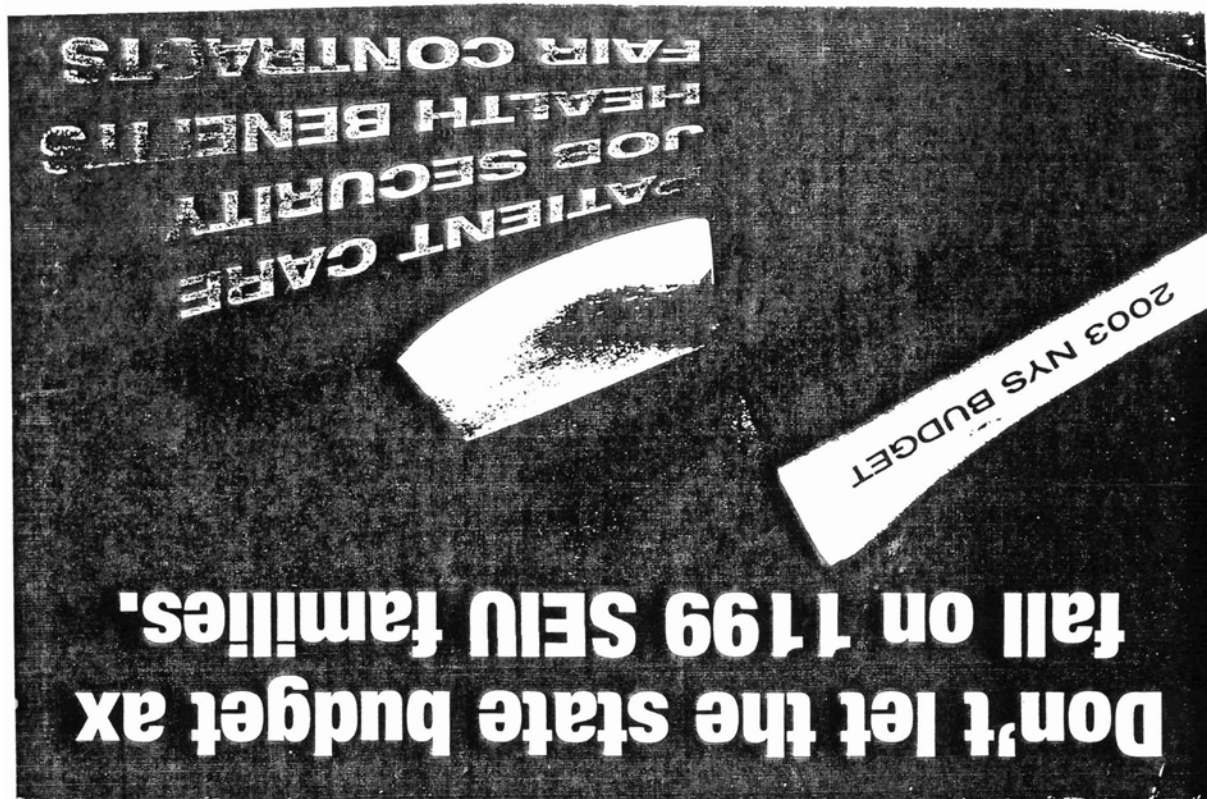
Sample COPE Cards/Leaflets

Minnesota State Council (inside)

<h1>SEIU COPE Works For You!</h1>	
<p>What we face:</p> <ul style="list-style-type: none"> • Loss and privatization of jobs • Higher health care costs • Cuts to our schools and facilities • Short staffing • Higher property taxes • High cost housing • Higher college tuition • Cuts to community services <p>What we can do:</p> <ul style="list-style-type: none"> • Donate to COPE • Talk to elected officials • Register co-workers to vote • Elect people who share our views 	<p>Contributions to COPE (Committee on Political Education)—SEIU's voluntary political action fund—are used for political and legislative activities. Your bargaining rights, job security, and working conditions are decided by elected officials.</p> <p>As a union, SEIU fights to protect all these things. COPE builds SEIU power through local, state, and federal political activities. The money is used for voter registration drives, get-out-the-vote activities and to hold elected officials accountable.</p> <p>Regular COPE contributions of \$8, \$5, \$3, or another amount per pay period give SEIU members the political power that we need.</p> <p>In 2002 SEIU in Minnesota: helped elect a city council member 6 school board members 5 state-wide and congressional candidates 14 state senators 17 state representatives <i>and</i> 3 SEIU members were elected to public office</p>
	
<p>Yes! I will do my part to make elected officials listen to working people Sign me up to contribute to SEIU's Committee on Political Education (COPE)</p>	
<p>Name (Please Print) _____ Home Address _____ City/State/Zip _____</p>	
<p>Home Phone _____ Home E-mail _____</p>	
<p>Employer _____ Occupation _____ Registered to vote? _____</p>	
<p>Social Security Number (for internal use only) _____ Birth Date _____</p>	
<p>I authorize my employer to deduct \$ _____ every _____ and transfer the funds to SEIU COPE. My signature shows that I have reviewed and agree with the terms on the reverse side of this card.</p>	
<p>Signature _____ Date _____</p>	

Sample COPE Cards/Leaflets

1199NY (outside)



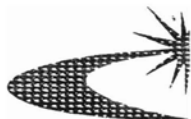
**For other ways to get involved to
help save quality healthcare
call 716-982-0540 ext. 220 (Western NY)
or 315-424-1743 ext. 110 (Central NY)**

1199 SEIU



Sample COPE Cards/Leaflets

Minnesota State Council (inside)



Join Our Political Action Fund

Martin Luther King Jr. Political Action Fund

Check-Off Authorization

Fill in all white areas

I hereby authorize 1199 SEIU New York's Health & Human Service Union, AFL-CIO, to file this payroll deduction form on my behalf with my employer to withhold \$1 per week or \$_____ per pay period and forward that amount to the 1199 SEIU Political Action Fund, 310 West 43rd Street, New York, NY 10036. This authorization is made voluntarily based on my specific understanding that (1) The signing of this authorization form and the making of these voluntary contributions are not conditions of my employment by my Employer or membership in any Union; (2) I may refuse to contribute without any reprisal; (3) The monthly contribution is only a suggestion, and I may contribute more or less without fear of favor or disadvantage from 1199 SEIU or my Employer; and (4) The 1199 SEIU Political Action Fund uses the money it receives for political purposes, including but not limited to, making contributions to and expenditures on behalf of candidates for federal, state, and local offices and addressing the political issues of public importance.

This authorization shall remain in full force and effect until revoked by me in writing to the 1199 SEIU Political Action Department at 330 West 42nd Street, New York, NY 10036.

SIGNATURE	DATE
<div></div>	
FIRST NAME	<div></div>
LAST NAME	<div></div>
SOCIAL SECURITY #	<div></div>
ADDRESS	<div></div>
CITY	<div></div>
STATE/ZIP	<div></div>
EMPLOYER/INSTITUTION	<div></div>
HOME PHONE #	<div></div>



If You Currently Contribute to the SEIU 1199Upstate Political Action Fund

Revocation of Current Political Action Fund Designation

This is an exciting time as we unite our political might with the power of 1199 SEIU! One of the most important reasons for our recent merger with 1199 SEIU was to put our strength together with the many other healthcare professionals across New York State.

In order to achieve this goal, all members who currently contribute to the SEIU 1199Upstate Political Action Fund must revoke their current payroll designation and sign up with the Martin Luther King Jr. Political Action Fund.

Just fill out the information to the right on this card and give it to your organizer or union representative.

To join the Martin Luther King Jr. Political Action fund, fill out the card above. **Together we will help strengthen our Union's political voice so we can continue standing up for what's important for our patients and all New York families!**

By executing a check-off authorization card the 1199 SEIU MLK Political Action Fund d_____, I hereby revoke any prior political action fund check-off authorization executed by r_____.

FIRST NAME	<div></div>
LAST NAME	<div></div>
EMPLOYER/INSTITUTION	<div></div>
SIGNATURE	<div></div>
C	<div></div>
MAIL	<div></div>

Sample COPE Cards/Leaflets

Local 49 Worksite Education Leaflet (Front-English)

Why do YOU give to COPE?



Mary Renneke, Storekeeper,
Good Samaritan Regional
Medical Center

COPE helped us form a union at my hospital

"Dozens of politicians — from school board members to state legislators to members of Congress — stood with workers at my hospital in our campaign to form a union and to bargain a fair contract. We need to elect leaders who will stand with workers, and I contribute to COPE to make that possible."



Mike Howard, Janitor, ABM, with Jim Francesconi,
Portland City Commissioner and Mayoral Candidate

COPE helped us win employer-paid health insurance

"In our last contract, we won fully-paid insurance for ourselves and the chance to win free health care for our kids. By being active in politics and contributing to COPE, we won new allies in elected office. These new allies then fought with us by supporting our contract campaign."

Voluntary COPE funds are a part of our union's **issue-based, member-driven political program**, which includes activities like **get-out-the-vote efforts, issue education, and member lobbying** of legislators in Olympia, Salem and Washington DC. Voluntary COPE funds are used in local, state and federal elections and for ballot measures. SEIU members, retirees, staff and our families may contribute to COPE, if they are US citizens or legal permanent residents. To sign up, visit www.seiu49.org/action/, talk to your Field Organizer, or call 503.236.4949 x22 (1.800.955.3352 x22).

COPE helped us fight anti-worker legislation

"Last year, the Bush Administration proposed that 8 million workers, including some health care workers, lose their right to overtime pay. SEIU members contacted our legislators — by phone, by email, and even at their offices on Capitol Hill — to help save overtime pay. COPE made it possible to wage this fight for working families."



Pamela Graves with sons Stephon and Sean - Member Intake Specialist,
Kaiser Permanente

COPE made the difference in our contract campaign

"In our last contract negotiations, we bargained for months with little movement on key issues, like health care. We held marches, rallies, and candlelight vigils, and then State Representative Mitch Greenlick joined us on a delegation to our hospital's administration. Having a politician stand with us in our fight made a huge difference. The hospital started taking us seriously, and we won the best contract we've ever had. That's the COPE fund in action."



Jon Addis, Nutrition Services,
Legacy Good Samaritan Hospital

¿Por qué contribuye Usted al fondo COPE?



Mary Renneke, Storekeeper,
Good Samaritan Regional
Medical Center

COPE nos ayudó a formar la unión en mi hospital

"Docenas de políticos — de miembros de la mesa escolar hasta congresistas — nos apoyaron en mi hospital en nuestra campaña para formar la unión y negociar un contrato justo. Necesitamos eleccionar a líderes que apoyarán a trabajadores, y contribuyo a COPE para hacer esto posible."



Mike Howard, Janitor, ABM, con Jim Francesconi,
Comisionado de la Ciudad y Candidato a Alcalde de Portland

COPE nos ayudó a ganar **aseguranza médica gratis**

"En nuestro último contrato, ganamos **aseguranza médica gratis** para nosotros y la oportunidad de ganarlo por nuestros hijos. Con nuestra actividad política y contribuciones a COPE, ganamos nuevos aliados políticos. Estos aliados nuevos entonces nos apoyaron en la campaña por el contrato."

El fondo COPE es parte del programa político de nuestra unión, el cual está **basado en nuestros asuntos y dirigido por miembros**, y incluye actividades como **educando y animando a votantes**, y **visitando a nuestros congresistas** en Olympia, Salem, y Washington DC. Los fondos de COPE se usan en elecciones locales, estatales, y federales, y en campañas por iniciativas. Miembros, jubilados, y personal de SEIU y nuestras familias pueden contribuir a COPE, si son ciudadanos o residentes permanentes de los EEUU. Para apuntarse, visite www.seiu49.org/action/, hable con su Organizador, o llame al 503.236.4949 x22 (1.800.955.3352 x22).

COPE nos ayudó a **pelear leyes anti-trabajadores**

"El año pasado, el presidente Bush propuso que 8 millones de trabajadores, incluso algunos trabajadores en hospitales, perdieran su derecho a pago "overtime." Miembros de SEIU hablamos con nuestros congresistas, por teléfono, por email, y en persona — para salvar el derecho al pago overtime. El fondo COPE lo hizo posible."



Pamela Graves con hijos Stephon y Sean • Member Intake Specialist,
Kaiser Permanente

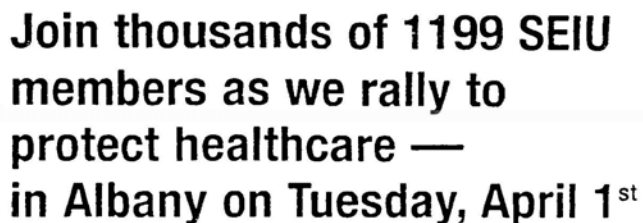
COPE hizo la diferencia en nuestro último contrato

"En nuestras últimas negociaciones, negociamos por meses pero no hubo movimiento en asuntos claves, como **aseguranza médica**. Organizamos marchas, manifestaciones, y vigilijs. Al fin, el Representante Estatal Mitch Greenlick vino con nosotros en una delegación a la administración del hospital. El hecho de que un político nos apoyó en nuestra lucha hizo la diferencia. El hospital empezó a tomarnos en serio, y ganamos nuestro mejor contrato que nunca. Todo esto es gracias al fondo COPE."



Jon Addis, Nutrition Services,
Legacy Good Samaritan Hospital

1199NY COPE sign-up during rally



Just fill out the attached rally card and return it to your organizer representative to reserve your place for our trip to Albany. And while at it, take the time to fill out the attached cards if you have not already done so. If you are not a member of the Martin Luther King Jr. Political Action Fund or registered to vote,

The Better Choice: Fair Tax Increases to Save Quality Health

Rally to Save Healthcare

- ☐ YES! I'll be there to help convince our state representatives to make the better choice and save quality healthcare.
- ☐ *I am also willing to lobby my state representatives at their local offices on behalf of a fair budget.*
- ☐ NO. I cannot attend the rally in Albany, but I would like to know what else I can do to be a part of the 1199 SEIU

FIRST NAME
 LAST NAME
 ADDRESS
 CITY
 STATE/ZIP
 EMPLOYER/INSTITUTION
 SOCIAL SECURITY #
 HOME PHONE #



WORKPLAN FOR A COPE DRIVE IN A LOCAL

Designed to be filled out together with APD and local Political Director

Local No. _____

Political Director/Staff Name _____

How many of our members are on COPE?

Number of members in local _____ divided by number of members COPE _____
Equals _____ percent of members on COPE.

What is the average yearly COPE \$ coming from our union membership?

Total COPE \$ per year _____ divided by Total number of members in local _____
Equals an average of \$ _____ per union member per year.

What is the standard that I am trying to get to?

\$ _____ per member per year

How much total COPE \$ am I trying to raise per year?

\$ _____ per member per year goal X _____ number of members in my local = _____ Goal
COPE \$ per year

How much more COPE \$ do I need to raise to get there?

Goal COPE \$ per year \$ _____ – Current COPE \$ per year \$ _____ =
\$ _____ COPE \$ I need to raise

Start Date of Program: _____ **Review date of Program:** _____

Number of Weeks: _____

Number of Work days: _____

Other Goals:

- Recruit _____ member COPE collectors
- Sign up _____ members themselves
- Daily card goal for each staff person _____

