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Workshop Training: Union Membership Mobilization and Collective Bargaining in an Open Shop Environment

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GROWING YOUR UNION:

ENGAGING PROFESSIONALS THROUGH NEW HIRE ORIENTATION



March 2017

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Growing Your Union: Engaging Professionals through New Hire Orientation is based upon the Jobs With Justice Education Fund publication, *Making the Case for Union Membership: The Strategic Value of New Hire Orientations*, and the American Federation of Government Employees' publication, *AFGE Leader's Guide to New Employee Orientation*.



About DPE

The Department for Professional Employees, AFL-CIO is a coalition of 23 national unions representing professional and technical employees. DPE affiliates represent millions of professionals in:

- » Education and healthcare;
- » Science, engineering, and technology;
- » Legal, business, and management;
- » Media, entertainment, and the arts; and
- » Public administration.

Professionals are essential to the future of the labor movement. DPE organizing materials, research, programs, and presentations help its affiliate unions organize more professional and technical employees and effectively represent current members.

DPE Mission

The DPE mission is to assist its affiliated unions in achieving their objectives. DPE does this by:

- » Providing a forum for its affiliates to collaborate, connect, and act;
- » Assisting affiliates in their efforts to organize, represent, and bargain on behalf of professional and technical employees;
- » Communicating the value of union membership to professional and technical employees and the public;
- » Advancing the interests of professional and technical employees through public policy and legislative advocacy;
- » Building alliances with professional associations and societies to promote the interests of professional and technical employees; and
- » Encouraging diversity in the professional and technical workforce.

DPE is an AFL-CIO trade department and as such is independent from the AFL-CIO allowing DPE to focus solely on advancing the interests of its affiliated unions.

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GROWING YOUR UNION:
Engaging Professionals Through New Hire Orientation

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Introduction

Welcoming newly hired professionals during their first days at work is the most effective way to establish a positive relationship with potential members. The first hours on the job are when new employees develop lasting impressions about their new employer, colleagues, and the union that will represent them. Taking a moment to explain how union membership will personally benefit them helps ensure that new hires have a good impression of your union and are more willing to become active members.

The most effective way your union can make a positive first impression is through a new hire orientation program that includes both a formal, group introduction to your union and informal follow-up with individual new hires. A high-quality new hire orientation program can help ensure your union consistently makes a positive first impression on newly hired professionals. When done well, new hire orientations have proven to increase sign ups among new hires and enhance their commitment to the union.

Growing Your Union: Engaging Professionals through New Hire Orientation offers a practical way for your union's leaders and staff to develop and enhance their orientations for new hires and potential members, tailored specifically to professional employees.

The best practices presented in this guide were derived from interviews with union leaders and staff responsible for their unions' orientation programs, observation of existing orientation programs, content analysis of union welcome packets, relevant social science research, and data from an October 2016 DPE-commissioned attitudinal survey by Hart Research Associates of 1,004 non-union professional and technical employees.

First, this guide provides an overview of new hire orientations. Second, the six steps that are necessary to launch a new hire orientation are discussed. Third, after your union has conducted its first orientation, suggestions for enhancing your orientation program are offered. Finally, advice is provided for continually improving your new hire orientation program.

New Hire Orientation Programs: An Overview

The aim of a new hire orientation program is to turn new hires into union members by giving them a positive first impression of the union. New hire orientations both informally and formally introduce new hires to the union. This section of the guide provides an overview of what an effective new hire program looks like. Each of the orientation program components will be explained in detail in the next section, “Creating Your New Hire Orientation Program.”

Formal Orientation

Ideally, the formal new hire orientation will take place on a new hire’s first day or at some point during the new hire’s first week. The formal orientation presentation is carried out by the “orientation facilitator.”

Your union’s formal orientation program should be professional, informative, and convincing. Research indicates that the amount of information new hires acquire during a union’s formal orientation and the overall quality of the program influences their perception of the union.

The formal orientation is an appropriate time to provide new hires with materials containing information about union membership. These should include new hire-focused handouts, an orientation packet, and free union-branded items (“freebies”).

A multimedia presentation is the best way to convey the orientation information to a new hire or group of new hires. Specifically, consider a PowerPoint presentation. If you do not have access to a projection system during the orientation, you can print out the PowerPoint slides and walk new hires through the presentation. Your union’s presentation to new hires should be tailored to fit your union’s unique circumstances.

In general, the presentation should include: 1) an introduction to the union; 2) an explanation of the collective bargaining agreement; 3) a discussion of what the union does beyond the workplace; 4) a description of how new members can get involved; and 5) a convincing case for union membership.

Follow-ups with New Hires

Your union’s orientation program should also include an “informal” follow-up, where union representatives and your designated union member volunteers, “follow-up ambassadors,” interact with new hires in their first days and weeks on the job.

This follow-up process should include: 1) follow-up by leadership; 2) follow-up by stewards (or your union's equivalent of a steward); 3) follow-up by ambassadors; and 4) follow-up by orientation facilitators.

The combination of a formal and informal introduction to the union is most likely to lead new hires to join the union and get involved.

Signing-up New Hires

Successful new hire orientations will result in member sign-ups. To measure the success of your orientation program, sign-ups from each new hire orientation should be tracked in an organized manner to measure the effectiveness of each orientation.

Creating Your New Hire Orientation Program

Developing your own high-quality union orientation program is not difficult, but it requires commitment and planning. After the orientation program is created, a process must be established to ensure that all new hires receive union orientation as soon as possible. Taking the time to set up an orientation program will help ensure your union can efficiently and effectively make a positive first impression on every potential new member.

This section will explain, on a step-by-step basis, how to plan and create a new hire orientation program.

Step 1: Secure Orientation Time

Aim to meet with new hires on their first day, or, at the very least, within their first week at work. Waiting to interact with new hires cedes time to others – the employer, an anti-union friend – who will be molding new hires' perceptions of your union. Even in the best workplaces, an employer is unlikely to give your union credit for the working conditions the union helped establish.

Negotiating for the right to meet privately with new hires during their first few days at work ensures your union is able to make an early, positive impression. (See Appendix A for sample contract language.) An employer's own orientation program offers an ideal time for unions to introduce themselves to new hires, since it tends to be mandatory, on the clock, and during new hires' first few days on the job. Unions should also negotiate for the right to receive an advance list of new hires, their start dates, and assigned work locations.

If it is not possible to meet with new hires during work time, unions should still aim to meet with new hires very soon after they start working. Aim to create as positive and hospitable an event as possible to encourage attendance. Free food is always appreciated. Unions can make their orientation part of a social function that would interest new hires, such as a lunch, happy hour, or coffee meet-up. Unions may also want to explore hosting a family-friendly orientation, since family members may also want to learn about union membership and arranging child care can be a challenge.

When members are geographically dispersed, unions should consider holding orientations at regional dual-purpose meetings that new hires are likely to attend, like training, professional development, and networking events. Depending on the meeting's purpose, employers may be willing to pay for new hires to attend. Another option for unions with geographically dispersed memberships is to develop web-based orientations. Scheduled online orientations or recorded webinars can both be successful tools for unions to introduce themselves to new hires. If a web-

based orientation is not possible, unions with dispersed memberships should, at a minimum, mail welcome packets to new hires *and* call them soon after they start working.

Step 2: Recruit an Orientation Team and Develop the Follow-up Process

Welcoming new hires on their first day and introducing them to the union is not only a smart way to recruit new members, but also a way to get existing members involved, especially those who are hesitant to participate in union activities that are more adversarial in nature—like grievance representation or bargaining.

As part of the orientation team, existing members can help the union make a positive first impression on potential new members in many ways. Members can volunteer to do as much as facilitate the formal union orientation, or as little as say hello to new hires when they enter the building on their first day. Union volunteers will also be needed to follow-up with new hires once they get to their assigned work area.

The orientation team is the heart of new hire orientations. The union member volunteers involved in the orientation team are responsible for carrying out the orientation and convincing new members to join your union.

Orientation Facilitators

While union leaders and stewards will play a role in welcoming new hires, your union will also need orientation facilitators. Orientation facilitators are critical to the success of an orientation program. They are the volunteers who will lead the formal orientation sessions for new hires. Orientation facilitators will need to have a solid understanding of the collective bargaining agreement and labor-management relationship, and, thus, be able to effectively answer questions about the union and the value of membership. See *Strategic Volunteer Recruitment* below for more information.

Develop the Follow-up Process

While your union's follow-up with new hires will be informal, your union should approach the follow-up process in a formal manner to be most effective. Create checklists indicating what steps union leaders, stewards, and ambassadors should take when new hires finish the union's formal orientation. (See Appendix B for a customizable, sample tracking document/follow-up checklist.) All new hires should receive informal follow-up, regardless if they signed up at the formal orientation session.

The following should participate in the follow-up process:

- » Leadership
- » Stewards
- » Ambassadors
- » Orientation facilitators

1. Follow-up by leadership

The union's leadership should welcome new hires to the workplace. Depending on your union's circumstances, leaders can communicate with new hires via phone, email, regular mail, or even in person. A welcome note shows that a local union president cares about each new member, and provides another opportunity to make the case for why new hires should become active, dues paying members.

Union leaders may play a formal role as orientation facilitators or an informal role as follow-up ambassadors. Follow-up by leaders (and stewards) is important as they likely have a deep understanding of the collective bargaining agreement and the labor-management relationship, and, thus, can effectively answer questions about the union and the value of membership.

2. Follow-up by stewards

Steward follow-up is especially critical to a successful orientation program, as research indicates peoples' perceptions of stewards significantly influences their view of unions. Additionally, stewards are the union representatives that new hires are going to call upon when they have a question or need the union's help.

Your union's stewards should know when new hires start working in their jurisdiction, and your stewards should make initial contact with these new hires within 24 hours of starting their new jobs. In that initial outreach, stewards should welcome new hires to the workplace, offer to show them around, and provide the types of tips and pointers that help with the transition into a new job. Consider preparing business cards for your stewards, with their contact information and other pertinent union contact information that they can hand out to new hires.

3. Follow-up by ambassadors

Follow-up ambassadors should be notified when new hires arrive in their work areas, and introduce themselves and welcome their new colleagues to the workplace. The introduction should have a positive mention of the union and the importance of becoming a member.

Acting as a follow-up ambassador requires minimal training, asks little of volunteers, and provides the dual purpose of engaging new hires and deepening the participation of existing members. The follow-up ambassador role is especially ideal for unions with large member-to-steward ratios or who represent people in decentralized workplaces. Follow-up ambassadors can even exist when members do not work side-by-side. In such circumstances, unions should provide a simple script and talking points so outreach can occur via phone.

4. Follow-up by orientation facilitators

Orientation facilitators can take an immediate step toward follow-up by establishing continued relationships with new hires. If facilitators are going to be working alongside or nearby the new hires, they should make it a point to tell the new hires that they will see them at work, and follow through. If facilitators are union officers or staff members who will not regularly work alongside the new hires, they should find ways to be visible in the new hires' workspaces.

Facilitators, especially union officers, should consider asking new hires to “friend” or follow them on social media platforms. Doing so connects the new hires to the union, while demonstrating that the union is ultimately a group of people joined together to better their lives, not just an institution.

Strategic Volunteer Recruitment

Volunteer recruitment should be strategic and tailored for each new hire or group of new hires. Unions should think about impressions, relatability, and diversity when selecting volunteers for the orientation team.

Orientation team volunteers will give new hires their first impression of the union, as well as the labor movement as a whole. Volunteers should be recruited with this in mind—asking the question, “Will this member accurately and positively represent the union?” could be helpful when choosing volunteers.

New Hire Orientation Checklist

- ☐ **Step 1:** Secure the right to have an orientation
- ☐ **Step 2:** Recruit an orientation team and develop a follow-up process
- ☐ **Step 3:** Create orientation materials
- ☐ **Step 4:** Create orientation presentation
- ☐ **Step 5:** Develop a sign-up process
- ☐ **Step 6:** Develop a sign-up tracking system

Relatability is another point to consider when recruiting an orientation team. If newly hired professionals do not see themselves in the union members they interact with in their first days on the job, they may not see themselves as part of the union. Unions should recruit volunteers with characteristics similar to those of the new hires. Factors to consider include: profession, race, age, gender, and language preferences. For example, if a hospital just hired seven nurses who are all women and recent college graduates, then *at least* one of the volunteers, either a facilitator or follow-up ambassador, on the orientation team should be a younger female nurse.

The union should also demonstrate its membership's diversity when selecting volunteers. Using two orientation facilitators, such as partnering a younger, engaged member with a more experienced member, can help ensure new hires get an informed, inclusive introduction to the union.

Volunteer Training

A formal training session for the volunteers interacting with new hires as part of the union's orientation, whether they are leaders, stewards, or rank-and-file members, helps prepare them to confidently welcome new hires in an appropriate, successful manner. Remember that anyone interacting with new hires will be viewed as representative of your union and the entire labor movement. You want them to be prepared.

Training sessions should offer a chance for facilitators as well as follow-up ambassadors to think about why they value working at their organization and how it relates to the union. Facilitators can also practice their presentations at the trainings, and all volunteers can prepare answers to potential tough questions from new hires about the value of union membership, such as why they should be expected to pay dues.

Surveys of non-union professionals indicate that professionals have concerns that unions are too involved in politics, protect poor performing employees, create conflict between employees and management, and do not provide a return for members that makes paying dues worth it. No matter the context, union representatives need to be able to calmly, credibly, and genuinely address even the most aggressive anti-union attitudes or questions, rather than shutting down the new hire asking the question.

Training sessions should also prepare volunteers to ask new hires to join the union. Volunteers will need to be prepared to respond to a range of answers, from an outright "no" to a "let me think about it." When a new hire does not agree to sign up, volunteers should gently and calmly ask a few questions to find out what concerns or doubts the person has about becoming a union member. When possible, the volunteer should provide concise, specific information that directly addresses the concerns. Even when a new hire seems insistent on not joining the union, volunteers should be sure the person is left with information about the union.



Step 3: Prepare Orientation Materials

Taking a multipronged approach to new hire orientation is likely to be most effective. Using multiple methods to convey your union's message will increase comprehension. One component of this is to give new hires information and materials to learn about and identify with the union. The materials distributed will be reflective of the union, thus if new hires receive high-quality materials they will likely view the union as high quality too. Low-quality content and materials can create the opposite impression of your union.

Orientation materials should include:

- » Handouts designed for new hires
- » Orientation packet
- » Freebies

1. Handouts designed for new hires

One way to make a positive first impression is with handouts that are designed specifically for new hires. Unions should *always* distribute handouts to new hires. Handouts can be in the form of brochures or flyers and are an opportunity to describe the role your union serves in the workplace and the benefits of membership.

In terms of handout content, a recent survey of non-union professionals showed that professionals are far more likely to join a union if that union can demonstrate that it has been effective at improving wages, benefits, and working conditions for professionals. Thus, your handouts should detail your union's success in improving wages, benefits, and working conditions.

Survey responses also showed that professionals want a union that is professional and puts members first. All handouts and union materials should be polished and leave the impression that your union is professional and member-driven.

2. Orientation packet

Beyond the core message your union wants to convey to a new hire in a handout or brochure, your union should also compile an orientation packet. Orientation packets could include:

- » Basic information about the union
 - History of the union
 - The role served by the union in the workplace
 - Gains achieved by the union
 - Activities organized by the union
- » A copy of the collective bargaining agreement
- » Contact information for local officers and stewards (ideally with current, color headshots)
- » An overview of member-only benefits
- » A recent union publication, such as a magazine or newsletter

Make sure the materials in the orientation packet are clear and written in a way that people who do not know a lot about unions can understand them.

3. Freebies

If available, it is a good idea to distribute union-branded freebies at your formal orientation. People like free stuff, and they like to show that they are a part of something. An item like a free union t-shirt or badge holder can build an identity with the union inside and outside the workplace. In planning your orientation program, think about what items would resonate with potential members, either because they are useful in the workplace or likely to be displayed outside of it. Aerospace engineers may like an extra flash drive, while teachers may rely on tote bags.

Step 4: Create the Orientation Presentation

Orientation participants will receive substantial amounts of information about the union in a short period of time. Multimedia presentations – which could include a PowerPoint slideshow or a brief, engaging video clip – will help increase comprehension among participants. As mentioned previously, your presentation should:

- » Introduce the union
- » Explain the collective bargaining agreement
- » Discuss what the union does beyond the workplace
- » Describe how new members can get involved
- » Make a convincing case for union membership

1. Introduce the union

Briefly overview the union's history, its key achievements, and an explanation of the union's structure. The achievements should include specific, tangible examples that positively impact the new hires and demonstrate your union's effectiveness (e.g. "We negotiated the right for people to

work from home when their children are sick, so they don't have to choose between missing work and taking care of their family.”)

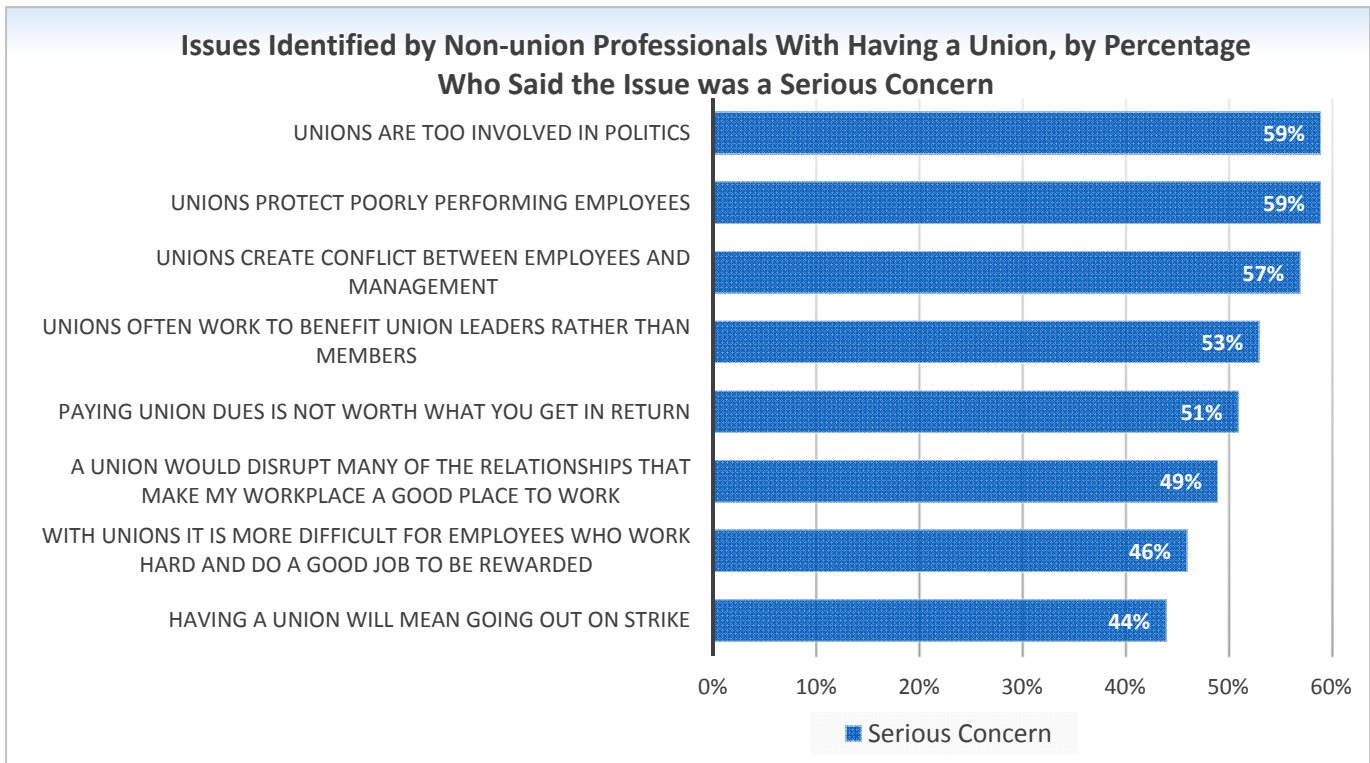
Do not assume that new hires know a lot about what unions do or how they function in the workplace. An explanation of the union's structure should include an accurate depiction of how unions operate and how decisions are made. Surveys indicate that professionals want a member-driven union that is responsive to members' individual needs.

Take a few minutes to educate professionals about the labor movement, which will make it less likely that new hires fall for anti-union half-truths and lies. Describe the local union's relationship to the regional (where applicable) and international levels of the union, and explain the international union's relationship to the broader labor movement. In doing so, make clear how the union's structure and relationship with other unions benefits the new hires (e.g. “The international keeps an eye out for us on national issues that affect our jobs and our industry”; “When unions work together, we have been able to preserve critical services, like protecting Medicare and Social Security from harmful cuts, that would be much harder to win alone.”)

2. Explain the collective bargaining agreement

Introduce new hires to their rights that the contract protects, particularly with regard to pay and benefits. Surveys indicate that the ability to improve salaries and benefits is the top concern for professionals deciding to join a union. Since there is not enough time to discuss every provision, consider focusing on contract provisions that existing bargaining unit members most frequently ask union representatives to clarify. Facilitators may also consider asking that new hires skim the contract's table of contents to show the breadth and depth of the collective bargaining agreement, and to see if the section titles prompt any questions.

Be prepared to address new hires' concerns about having a union, including conflict with management. Emphasize that while the union stands up for its members, it has a cooperative, solution-driven relationship with management. Clearly explain the grievance procedure, but do not dwell on the potential this has for creating conflict with management. Focus instead on the fact that a grievance process makes sure that the employer applies the discipline process fairly and correctly, and that the union is there to make sure no one employee has the responsibility of holding management accountable to the rules it agreed to follow.



Department for Professional Employees, AFL-CIO, Survey of 1,004 Non-union Professionals, October 2016.

3. Discuss what the union does beyond the workplace

Do not assume new hires know why some unions participate in politics or partake in community service – explain with tangible examples how the union improves the lives of members outside of work. Remember that a top concern for non-union professionals is that unions are too involved in politics. Show how the political process affects members’ day-to-day lives, speaking to the values of the union and the values of new hires. (E.g. Unions of nurses can point out that legislated staffing ratios allows nurses to provide quality care.) Professional employees tend to be committed to their profession, so unions should demonstrate the union’s role in advancing the profession. A message that articulates how being part of the profession means being supportive of the union may resonate with new hires who are lukewarm to unions, but committed to their profession.

4. Describe how new members can get involved

Use the formal orientation session to recruit people who join the union to get involved. Participation in union activities is linked with higher union commitment. Highlight the various ways that members can get involved in union activities, whether it be playing on the union’s softball team, helping out with a food drive, or simply attending a family picnic. (See Appendix C for a sample participation form.) Making it clear to new hires that participating in union



activities is popular among the membership should encourage the newest members to get involved since people are inclined to do what is popular.

At the same time, do not force participation on someone you sense wants to join the union but does not want to be an active member. You do not want a potential member to feel that they can only join if they plan to be actively involved.

5. Make a convincing case for union membership

Be clear with new hires that certain benefits are only available to full, dues-paying members. Providing a professional, matter-of-fact explanation can help win over new hires who are “on the fence” about joining, and do not realize all that union membership offers. To drive home the point, consider including a handout or PowerPoint slide that shows side-by-side the number of benefits and opportunities available to full members as compared to fee payers or non-members. Be sure to highlight benefits like free or discounted access to career development opportunities, professional certifications, professional publications, scholarships, and consumer products and services.

Surveys of professionals indicate that professionals want a union that will help them earn better pay and benefits, and advance in their careers. Emphasize the wage and benefit gains that have been made in contract negotiations and explain that a large, active membership makes it less likely that management will ignore demands for even more improvements. Such benefits may be particularly convincing to professionals worried that union dues are an expense they cannot afford, or who are unable to see the personal return on “investing” in union membership.

Messaging Tips

When crafting your presentation or training members on how to talk to new hires, you should think about the message you are delivering and how it is being conveyed. Here are some points to keep in mind:

- » Be welcoming and convincing
- » Don't oversell what your union can do
- » Be aware of real world dynamics

1. Be welcoming and convincing

A guiding principle should be to speak to your union's values. Many new hires are likely to relate or connect with at least some of your union's values, if not all of them. A 2016 survey of non-union professionals on their attitudes toward unions showed that respondents most wanted a

union that would stand for fairness, integrity, and professionalism. Connecting with professionals on these values may be appealing.

Preferred Union Qualities	Preferred Union Values
Effective	Fairness
Puts Members First	Integrity
Professional	Professionalism
Strong	Equality
Caring	Opportunity
Qualities and values preferred by non-union professionals, ranked by most important quality or value a union could possess. DPE, October 2016 survey of professionals.	

Find ways to talk about your union as “us” and “we.” Doing so will help cultivate a sense of inclusive identity, rather than leading new hires to think of your union as an outsider that is separate and apart from its membership.

Remain upbeat and positive in your presentation, no matter how contentious the relationship with management may be. New hires are not aware of the past bad history with management, and they will be intent on making a positive impression with their supervisors. The last thing a new hire wants is to be branded a “troublemaker.” Focus on demonstrating that your union is a source of solutions, not problems. You want new hires to feel that joining your union is a positive step in their working lives.

2. Don't oversell what your union can do

While orientations are a time to convince new hires that they should join your union, do not overstate what your union can do for members. Research shows that people end up less committed to organizations that cannot deliver on the promises they make members.

3. Be aware of real world dynamics

Be aware of circumstances faced by new hires and be prepared to adjust your presentation accordingly. New hires that recently graduated from college may be concerned about the prospect of repaying their student loans and affording union dues. Make sure these new hires know about any discounted dues rates for recent graduates. Let recent graduates know what career advancement opportunities are available through union membership, so they can best understand that joining your union will pay dividends.

Know the new hires' schedule. If your union's orientation is at the end of a day of presentations, realize that participants are likely tired and unable to process much more information. Focus on making overall points about the value of union membership, getting written information in the hands of new hires, and making sure your union can follow-up with participants individually. Still be sure to ask new hires to join your union and walk them through the sign-up process.

Invite New Hires to Meetings, Events, or Actions

Orientation facilitators should invite new hires to attend a union event – such as an upcoming meeting, action, or social event. However, the invitation must be strategic to ensure that new hires are invited to events and activities that are effective and positive. For example, invite new hires to the next monthly union meeting if it is well attended and showcases the breadth and scope of the union. If union meetings are sparsely attended or serve as a forum for complaints from dissatisfied members, new hires may get the wrong impression about the union.

Step 5: Sign-up New Members

A crucial, if not the primary, objective of your formal orientation should be signing-up new members. That means you want to make the sign-up process as simple as possible for new hires, while being mindful of legal obligations. Ask new hires to provide only information essential for establishing their membership with the union (e.g. if your union doesn't need a new hire's Social Security number, do not ask for it.) If your union represents people in freelance jobs or other professionals without a common workplace, make it easy for them to sign up online.

Your orientation should make time to explain how new hires can join your union, and a request that they do so. Ask new hires to join your union with confidence, assuming they want to become members. Being indirect about the sign-up process or making a hard sell may unintentionally make new hires wary about joining without more information.

Walk through the paperwork, making clear what information is needed from new hires and why it is needed. Explain when people can access their membership benefits and when dues are processed and debited.

New hires who do not sign up after being asked during the formal orientation program should be asked again to join the union during informal follow-up. A tracking system (discussed below) will allow your union to know if and when new hires joined the union.

Step 6: Implement a Tracking System

Simple tracking will make it easier to maintain a high-quality orientation program for the long haul, even as leaders get busy, stewards change, or other priorities arise for the union. A tracking system will help assess the strengths and weaknesses of your union's new hire orientation program, which ultimately will lead to developing a stronger program.

An Excel spreadsheet is all you need to monitor the success of your orientation program. The spreadsheet should keep track of every new hire, noting who attended your union's formal orientation, who has had informal follow-up interactions with new hires, who has joined the union, and who has signed-up to participate in union activities.

Use the tracking system to determine which elements of your orientation program are leading to more sign-ups. It could be that one orientation facilitator has more success than others or that a combination of a PowerPoint presentation and two informal follow-ups leads to more sign-ups. (See Appendix B for a customizable, sample tracking document/follow-up checklist.)

Enhancing Your Orientation Program

Once you have a handle on the basics of a new hire orientation program you can consider enhancing your orientation with a welcome ceremony for new members and/or a mentor program.

Create Rituals to Celebrate Joining the Union

You know that becoming a union member is a good thing, and it is important that new hires do to. Publicly celebrating a person's induction into the union helps develop commitment and a positive attitude toward the union.

If your union already has an initiation ceremony or rituals to recognize new members, maintain and improve them as necessary. If your union does not formally welcome new members in a public manner, consider creating some welcome rituals. Unions may consider recognizing new members at their first union meeting with a round of applause and the presentation of a small token of appreciation. Unions can also provide written recognition of new members in the union's newsletter or other member communications.

Provide New Members with Mentors

Today, many people enter union jobs without a deep understanding of the labor movement or the knowledge that comes from growing up in a union family. Surveys of non-union professionals indicate that a large majority only know a little about unions representing professionals. Mentors can fill this knowledge void by informally educating new members about the value of the union, how to get the most out of union membership, and membership expectations.

While mentorship programs can be helpful in acclimating new members, they do require a degree of commitment and oversight. A union's mentorship program should provide structure and guidelines for cultivating mentor-mentee relationships and ensuring new members have a positive introduction to the union. Mentors should have basic guidance on what is expected of them, know how often to interact with their mentees, information on conversation starters, and a method to report their interactions with mentees so the union can be sure mentoring occurs. A mentorship program therefore will require a bit of time and effort to setup, but, once established, administering the program need not be burdensome.

Look For Ways to Continually Improve

A successful orientation program is one that leads to the maximum number of new hires becoming committed, dues-paying members. Thus, your union should set a goal for sign-ups and participation among new hires, and regularly review its orientation program tracking data to see if the goals are being met. If goals are not being met, use insights from your data to make the necessary adjustments. For instance, if new hires who receive a welcome letter and an in-person greeting join the union at a higher rate than those who only get a welcome letter, make sure every new hire gets both the letter and in-person greeting.

Solicit Feedback from Orientation Participants

In addition to the tracking data, unions may also gain insight into their orientation program's effectiveness by surveying new hires after they go through the formal orientation session. Consider asking new hires to answer a few short questions to help determine if your orientation program convinces them to join the union and become active, committed members.

Recognize Successful Orientation Programs and High-Achieving Facilitators

Make sure your union's leaders, members, and staff know that devoting energy to a high-quality orientation program is worth the time and effort. Use union publications to spotlight locals with successful orientation programs that have high sign-up rates. Within a local, unions can feature orientation facilitators and people assigned post-orientation follow-up who signed-up the most new members. Consider special commendations for excellent orientation facilitators at union conventions and conferences. Such recognition, whether in print or in person, creates healthy competition, motivating others to sign-up, follow-up with, and make outreach to new hires about joining your union.

Conclusion

You know how valuable your union is to your workplace and new hires should too. A new hire orientation program is the best way to convey the positive influence your union has in your workplace. Taking the time to put in place the infrastructure to orient all new hires will make your union stronger and more effective.

Even though many professionals have concerns about having a union in the workplace, most professionals are supportive of unions. The concerns that professionals have about unions typically stems from a lack of direct contact with unions. New hire orientation is your union's best opportunity to explain what your union does, how it is effective, and generally educate the new hire about unions. If you follow the steps in this guide it will increase the likelihood that newly hired professionals will join and become committed union members.

Growing Your Union: Engaging Professionals through New Hire Orientation has overviewed the steps involved in a successful new hire orientation program and should serve as a guide when creating your union's own program. Unions affiliated with DPE interested in additional resources or guidance when constructing their own new hire orientation programs can contact DPE at info@dpeaflcio.org or by phone at [202-638-0320](tel:202-638-0320).

APPENDIX A: Sample Contract Language

Below is sample bargaining language your union can use to ensure it can meet with new employees on paid time during their first week at work. If you do not have the right to meet with new hires during their first week of employment, your union should consider adding the proposed sample language to the list of bargaining proposals during your next round of negotiations.

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

APPENDIX B: Sample Union Orientation Tracking/Follow-Up Checklist

New Hire Name	Orientation Completed (Date)	Orientation Facilitator	Signed Card? (Date)	Add to Distribution List (Date)	Welcome Letter Sent (Date)	Follow-Up Assigned To	First Follow-Up Completed (Date)	Second Follow-Up Completed (Date)
Mary Jones	4/5/2016	SW	Y (4/5/16)	Y (4/6/16)	Y (4/6/16)	DN	Y (4/7/16)	N

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

APPENDIX C: Sample Participation Form

[Union Logo]

As a union of professionals, we know that joining together is how we can improve our communities. Joining together is also rewarding and fun! We provide numerous ways to get involved, and we hope you will join us.

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

Community Service	_____
Diversity and Inclusion	_____
Education/Training	_____
Organizing	_____
Politics/Legislative	_____
Recreation/Outdoors/Sports	_____
Union Leadership	_____
Veterans' Issues	_____
Women's Issues	_____
LGBTQ Issues	_____
Other issues I'd like to see the union engage in	_____

Name: _____

Phone Number: _____

Email Address: _____

How do you prefer to receive information? Phone _____ Email _____ Text Message _____



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