

# *Strategic Planning A Handbook for Locals and Activists*



ONTARIO MUNICIPAL EMPLOYEES COORDINATING COMMITTEE



COMITÉ DE COORDINATION DES EMPLOYÉES ET EMPLOYÉS MUNICIPAUX DE L'ONTARIO





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The OMECC Committee is pleased to offer this tool to Municipal Locals.  
Strategic Planning is an essential part to the success of OMECC's Campaign,  
"Working Together Toward 2014"

In solidarity!

# INTRODUCTION

## What is Strategic Planning?

Strategic Planning (SP) is a collaborative way to set achievable and measurable goals for your Local. It will help you determine what will be implemented over a matter of weeks and years so your Local can evolve and grow to serve your membership better. It is also a way to build capacity and activism within your Local.

One key question is: does your Local spend most of its time reacting to urgencies and emergencies in the work place? Often the answer is, “yes”, and completing a strategic planning process will help the Local act in a different way.

Strategic planning can teach the ability to help control future outcomes – such as influencing political situations which will benefit your membership. There will always be emergencies that arise in our workplaces, but a strategic plan can help your Local achieve a level of proactivity by getting ahead of issues you can see coming.

In the end, strategic planning can be summed up as,

- Where are we now?
- Where do we want to be?
- How do we get there?



# PART ONE –

## GETTING STARTED

### Commitment

The Local's success will depend on your desire and level of commitment to your strategic process and planning.

You don't have to commit to strategic planning on a weekly basis. But, whatever time you spend on the process must be protected time or you will soon see your efforts fizzle.

### Identify Your Strategic Planning Group

Identify who will participate in the strategic planning process. In our Union we have to remember that we work within a cooperative and democratic organization. Your Local is always to be accountable to others; your executive board, and your membership. On most issues you will require buy-in for your initiatives depending on the outcomes you are trying to achieve. Who and how many are part of your strategic planning group will depend on the size and structure of your Local.

Identify a core group for the strategic planning process. This can be any combination of table officers, other officers, committee members etc.... Don't allow the core group to be too large, but, the core group must always remain accountable to others, especially members. Communicate decisions, initiatives and get buy-in at all levels.

### Creating Priority and Focus for Planning

The single most important thing is to do your strategic planning away from the possibility of interruption and distraction. For planning to be effective all the participants need to focus. If possible, find a place away from where your union business is normally done such as the local CUPE office or someone's home.

Coordinate your calendars and determine how much time you are going to devote to the process. It doesn't matter how much time is taken, but it should be regular and all participants need to commit to protecting the time.

Strategic planning is not a one time event. You will continually circle back to an agreed upon Mission Statement, vision, and the goals you have set to ensure they are implemented.

Depending on your Local's resources, you may want to book members off for half or full days. This is your decision, but make the time and venue for planning appropriately to foster the engagement of the core group. Allow ample time to discuss, explore ideas, and prioritize without the distraction of the daily running of the Local.

### Identify Resources You Will Need.

You will have to start by tracking the issues and goals you identify; for example, assign one of your groups to take accurate notes. If possible, try to hold your meetings where the notes of your discussions and decisions agreed to are projected for the group to see as you work. Create and save your work electronically if you have that ability.

Try to anticipate any resource materials you will need for your planning such as,

- Calendars (this year, and at least 5 years into the future): to set strategic planning dates, identify calendar barriers such as religious observances, CUPE conferences and conventions, elections, and long term planning.
- Ontario division and national schedule of events at least one year in advance of the start of your planning process
- Local's bylaws
- CUPE constitution
- Collective agreements
- Internal elections
- Other important external dates, such as municipal elections and provincial elections, NEB meetings and cost-share deadlines
- Note paper and pens for each members of strategic planning group
- Access to internet, if possible
- Computer or laptop for the group's note taking (projected if possible)
- Local's budget actual and projected

Once you agree on a timetable do not deviate, if possible. If you agree to meet once a month and one month is cancelled it is then two months before your next opportunity to check your progress on issues. It is important that all the participants understand their commitment to protect dates. Have a back-up plan for who will take urgent calls from members while the strategic planning group is working.

You will have to establish a budget. If you are planning to book people off from work for a day or two a month this will take financial resources from the Local. The budget for book-offs will also determine when and how you will conduct your planning sessions. As you proceed through your planning issues that require financial resources will be identified. Your budget will evolve as you proceed, as will requests for cost sharing.



## **CHECK LIST: GETTING STARTED**

- ✓ Commit to protected time on a regular basis by coordinating calendars of the core group
- ✓ Chose a core group to lead the process
- ✓ Determine staff resources, such as national staff to be involved as core group, or as resources
- ✓ Develop a plan for how the Local's business will proceed on days you are in SP
- ✓ Identify other resources needed
- ✓ Expand participation accordingly
- ✓ Be accountable to the rest of your organization, and especially your members
- ✓ Communicate through the process
- ✓ Establish a budget as needed to support the process



# **PART TWO –**

## **CREATE A MISSION STATEMENT**

A Mission Statement for this process will describe why your Local exists, who it serves and the values it stands for. Developing a Mission Statement is an important exercise. There is no requirement for your Mission Statement to be long, or short. It creates a basis for your approach to a strategic plan and lays the purpose and values that will always remain your guide in years to come. It also serves as a way for members and participants in the process to have buy-in on the exercise.

The Statement is a clear indication of your goals and identity. It should include information about your Local, who it represents, the type of work members do, and what you want to accomplish.

Think about your membership:

- What's the level of diversity?
- Is the membership mainly female?
- What's the relationship with the employer(s)?
- Other considerations

Keeping these points in mind will help your Local express in its Mission Statement, the values it wants to promote and stand for through strategic planning.

### **EXAMPLES:**

*Thank you to Local 79 and Local 966 for sharing their Mission Statements.*

### **CUPE Local 79**

*“Active Vision Statement*

*Local 79 leadership, activists, and members re-affirm our purpose, in keeping with our By-laws, to improve and maintain the social and economic welfare of our members, the Toronto community we serve and workers in general.*

*We do so by committing ourselves to an ongoing process of building solidarity and the capacity of the membership and the Local in order to promote those interests in the workplace, at the bargaining table and in the community. We will continuously improve: strategic planning, communication, education and mobilization in the Local.*

*We commit ourselves to a process of proactive union-building grounded in our core purpose to cultivate a culture of solidarity, respect for and pride in our Union and the services our members provide through their work.”*

## CUPE LOCAL 966

### *“Our Mission Statement*

*The mission of Local 966 is to build a more secure future for the Local and for the Union and the Union movement through a process of Strategic Planning.*

*We will continue to build a positive profile in our community and to be recognized for the work our members and the Local do within our community. We will achieve this by developing processes and a structure that hold our Local's leadership at all levels accountable to the members through mobilization, good communications, transparency and education. We will continue our commitment to develop community partners to the benefit of the community we work and live in. These partnerships will give us greater power at the bargaining table and we will seek support from our partners in a crisis.*

*It is also our mission to elect politicians that are progressive and who respect, support and foster the services our members provide. We will commit to lobbying our politicians to a greater extent in order to advance issues and policies that protect our members' jobs and working conditions.*

*For the betterment of the Union movement and Local 966 we will continue to foster activism throughout our membership and support and encourage unionism wherever possible.”*

### **CHECK LIST: CREATE A MISSION STATEMENT**

- ✓ Create a Mission Statement
- ✓ Include who and where and what the Local does
- ✓ How the Local will go about its work and what values it wants to express
- ✓ How the Local will fulfill its purpose

## **PART THREE –**

### **BE ACCOUNTABLE AND COMMUNICATE**

As mentioned previously, your strategic planning in most cases will require some forms of approval to the membership and/or your Executive and/or Executive Board.

Your strategic planning will most certainly require budget decisions. These are the kinds of budget requirements that may arise in your planning,

- ✓ Book-offs for planning and implementation of initiatives that come out of SP Rental of facilities to hold your SP
- ✓ Rental or purchase of technology
- ✓ Cost shares with CUPE National or the Ontario Division for campaigns you may undertake as a result of SP

To secure the desired amount of funding or to initiate a change in how you operate, you may have to go to the membership if you require amendments to your bylaws. This will often arise when your Local is looking at revising its structures and processes. Bylaws improvement may in some cases be a goal or issue identified by your SP.

Keep your Executive Board and membership apprised of your SP – get buy-in to the process from the start. Let them know why you are doing strategic planning, and how it will benefit members and the Local. It is important to return to them with reports on your progress on a regular basis. Remaining transparent to your membership will build confidence in your Local as members start to see the results of your planning and implementation process. You will instill confidence in the membership that their Local is in good order no matter how modest your strategic goals may be.

#### **CHECK LIST: BE ACCOUNTABLE AND COMMUNICATE**

- ✓ Bring budget or planning issues to the membership in accordance with your bylaws
- ✓ If needed, bring bylaw changes to the membership and seek approval from CUPE National
- ✓ Submit book-off request to the employer (if required), well in advance of your planning dates
- ✓ Keep your Executive Board regularly informed to create and maintain buy-in (Unless they are part of the SP core group)
- ✓ Report back to your membership as you accomplish your goals to maintain enthusiasm and buy-in. Always try to recruit rank and file members to help with implementation of your goals.



## **PART FOUR –**

### **SETTING LONG TERM GOALS AND PRIORITIES (“The Bucket List”)**

The Mission Statement you create is not concrete. As we noted earlier, it serves as a guide.

Think a number of years into the future. What do you want your Local to look like? This can be anything from the number of members, the Local’s structure, how the Local services its members, will business be done electronically?

Your core group will decide what the appropriate long term goals are. Think of the long term goals as buckets that will hold a list of short term goals and tasks that will be done to achieve your Local’s long term goals.

#### **EXAMPLE:**

Local XX decided their long term goals and priorities would be,

- ✓ Improve member engagement and mobilization
- ✓ Expand the numbers of members in the Local – organizing campaigns
- ✓ Improve communications
- ✓ Continually strengthen our collective agreement(s) through strong effective bargaining

#### **CHECK LIST: SETTING LONG TERM GOALS AND PRIORITIES**

- ✓ Create a short list of long term goals and priorities
- ✓ Goals and priorities should be broad based (buckets)
- ✓ Your goals and priorities will not change from year to year and will be your guide into the future
- ✓ Break down your goals and priorities into smaller, short term parts (covered in part five)





## **PART FIVE –**

# **THE PLAN TO MAKE YOUR LONG TERM GOALS AND PRIORITIES A REALITY**

Once you have identified the Long Term Goals and Priorities for your Local you need to start breaking it down into manageable pieces to carry through on your plan. As they say, “Rome wasn’t built in a day” – don’t expect immediate transformation of your Local.

### Identify Barriers and Issues

Before you start your identifying task to achieve long term goals make sure you know your Local. For example, member engagement and mobilization might start with a discussion on where and how are members involved now? What is the attendance at functions and meetings like? What are the demographics of your Local?

Then you can start to brainstorm ideas that might improve attendance at meetings and functions of the Local (see examples below).

### Be Inclusive

This may be the perfect time to involve a larger group of people, such as your Executive Board, or members of Committees. Consultation is one of the positive side effects of strategic planning that as you communicate out through your Local you devise and implement a plan. The Local is seen as providing leadership and creating activism by involving other parts of the organization. When others have a voice it creates buy-in to the strategic plan of the Local.

Don’t reject ideas brought forward. You don’t want to stifle creative thinking and enthusiasm. Record all ideas (tasks and activities). You may find these ideas don’t make sense now, but might become relevant in the future.

### **EXAMPLE:**

Using the long term goals example in part four, brainstorming will result in the long term goals being broken down into smaller, more manageable parts and actions. We’ll show you how to track and prioritize the tasks and activities in part six.

- ✓ **Improve member engagement and mobilization, tasks and activities that will be implemented to achieve your goals**
  - Improve attendance at general membership meetings and unit meetings
  - Create a welcome package for new members and meet with new members face-to-face
  - Create new committees; 'Young Workers' Committee, Pink Triangle, Retirees
  - "Lunch and Learn" sessions in the workplace
  - Hold more social events for the membership; holiday dance, summer picnic, Labour Day celebration
  - Promote education
  
- ✓ **Organizing campaign**
  - Mapping of non-unionized workers that can be organized by our Local
  - Training for Stewards to become member organizers
  
- ✓ **Improve communications**
  - Re-design the Local's website and assign people to update
  - Secure member information from the employer
  - Collect members' home emails and become less reliant on mailings
  - Redesign our Local's newsletter – more engaging, celebrate our successes
  - Use social media
  
- ✓ **Continually strengthen our collective agreement(s) through strong effective bargaining**
  - Public campaign to educate the community on the great work our members do
  - Strike aversion campaign
  - Good research – CUPE
  - Seek disclosure from the employer well in advance of bargaining
  - Educate our membership on how bargaining works
  - Seek input from the membership on their priorities for bargaining
  - Elect/appoint our bargaining committee(s) and provide education

As you can see, there are many smaller pieces to the long term goals. Your list may be much longer than this example!

## **CHECK LIST: THE PLAN TO MAKE YOUR LONG TERM GOALS AND PRIORITIES A REALITY**

- ✓ Be patient, most change will take time
- ✓ Consider expanding the participants for this discussion
- ✓ Be inclusive, remember your stewards, committees and Executive Boards may have valuable input
- ✓ Record all ideas, don't stifle creative input and enthusiasm



## **PART SIX – TRACKING, PRIORITIZING AND ACCOUNTABILITY**

As you brainstorm items under part five, make a list of all the ideas that come forward. Don't reject ideas; what may not seem relevant, important or necessary now may be the perfect idea a year from your initial planning process.

Keep track of the ideas and group under the broad based visions/goals in part four.

Prioritize your ideas and assign a date by which you want to have completed the action. You will find some of these actions are broken down further at this stage (see examples below).

Assign who will work on any of the actions and identify who is the lead if there is a group assigned.

At each strategic planning meeting, go over your list. Following a process will help to keep everyone involved accountable. Don't get discouraged if things don't get done according to the schedule. As long as everyone is committed to the plan small delays won't hurt.

EXAMPLE: LOCAL X

STRATEGIC PLANNING TRACKING DOCUMENT

<b>Vision Subject</b>	<b>Date Started</b>	<b>Action Required</b>	<b>Assigned To</b>	<b>Date Due/Completed</b>
<b>Member Engagement and Mobilization</b>		GMM attendance		
GMM Attendance	March 4, 2013	Identify guest speakers to draw members out	Recording Secretary to collaborate with committees	SP April 22, 2013
	March 4, 2013	Rotate location of meetings	Andy – investigate possible locations and report back	Next SP meeting
<b>Organizing Campaign</b>				
Mapping	March 4, 2013	Identify non-union that can be organized under our Local	Vice President	Q 2, 2013 ( <i>Means second quarter</i> )
<b>Improve Communications</b>				
Employer provides member information	March 4, 2013	Obtain revised contact list for Members. Write the employer	President	End of March 2013
Collect Member home emails	March 4, 2013	Develop a strategy to encourage members to provide report back to SP	Recording Secretary and Communications Committee	SP April 22, 2013
<b>Strengthen Collective Agreement(s) / Strong Effective Bargaining</b>				
Bargaining Committee	March 4, 2013	Hold educational on bargaining – all members welcome	Education Chair	No less than one year prior to bargaining (December 2013)
Bargaining Committee	March 4, 2013	Election of committee	Table Officers	No later than Q 1, 2014

If possible, provide each core group member (or others as invited) with a hard copy of the chart for their records. Other tactics include, displaying planning documents on a projector and screen. This keeps everyone focussed and engaged in what's being assigned and prioritized.

Actions you don't want to implement immediately can be kept on this chart with no assignment so you can revive the ideas if needed.

### **CHECK LIST: TRACKING, PRIORITIZING AND ACCOUNTABILITY**

- ✓ Record all ideas for implementation
- ✓ Determine reasonable start and end times of tasks to be completed and implemented
- ✓ Assign tasks and actions to specific people
- ✓ Be inclusive
- ✓ Assign tasks to various parts of your organization to create enthusiasm for change and build activism and capacity
- ✓ Individuals must be accountable for finishing tasks on time
- ✓ Provide all participants with updated tracking to maintain enthusiasm and focus on completion of tasks





## **PART SEVEN – BUY-IN AT ALL LEVELS**

Your strategic plan will result in changes to your Local's business.

Your plans will require a budget be assigned. This will naturally go before the membership for approval.

You may also discover that your bylaws require revisions. If you can achieve your vision working with the existing bylaws, do so. If changes are needed this too will require membership and CUPE National approval.

For these and other reasons, once you have your Mission Statement, vision and some early actions accomplished, present your ideas to your Executive Board, followed by other interested parties such as you committees and steward bodies. If they buy-in it is appropriate to present your plan to the membership. If you have prior buy-in from the Executive Board and Committees the membership will see that their entire leadership is moving in the same direction with a common vision and goals. This will help to ensure full support of your members and the desired tasks get completed.

### **CHECK LIST: BUY-IN AT ALL LEVELS**

- ✓ Be transparent at all levels of the Local
- ✓ Seek appropriate approval of the members in accordance with your bylaws for budget and any bylaw changes which may be necessary
- ✓ Make your Board, committees, stewards and membership partners in planning to encourage member engagement and activism
- ✓ Celebrate you accomplishments!



## **PART EIGHT – RESOURCES TO HELP YOU SUCCEED!**

Include your CUPE National Representative in your planning. They will be the conduit to other CUPE Resources you will need; cost share campaigns, research, communications, legal, education.

Collaborate with Local's in your region. On issues like organizing there may be groups of employees better organized by other sectors. Other Locals may have valuable information for your Local on this.

Educational workshops can be more frequent by including other Locals' membership, especially if your Local cannot support a full class. Don't forget about the Ontario Divisions Fall and Spring CUPE Schools – don't reinvent a wheel that already exists.

Use the CUPE National and Ontario Division websites to download materials that will support your discussions and may be of assistance in problem solving and implementing your plan. The OFL and CLC websites are also a great source of information.

### **CHECK LIST: RESOURCES TO HELP YOU SUCCEED!**

- ✓ Include your CUPE National Representative in your planning to assist and be a conduit to other CUPE resources
- ✓ CUPE resources and support includes; cost share campaigns, research, communications, legal, education
- ✓ Collaborate and work in coalition with Locals in your Region where appropriate
- ✓ Pool your resources with other Locals on issues like education for members
- ✓ Access the CUPE National, CUPE Ontario, Canadian Labour Congress (CLC) and Ontario Federation of Labour (OFL) websites for resource material and information and research



