

# WEEK 1: The Union as a Business Checklist

## DO NOT DISTRIBUTE

### Topics

1. Similarities between a union and any other business
2. Union Organizational Chart
3. Financial Statements and Financial Position
4. Union Performance
5. Unions as failing business – balancing fewer members to rising overhead
  - ❖ Cut services
  - ❖ Recruit new members
  - ❖ Raise dues

### Research

- Research union financial documents (LM-2 or -3)
- Research union political spending
- Research pay for union officers (especially if large, well-known union)

### Meeting Planning

- Decide whether you want to do a local version of the LM-2 slide - if so, revise that slide
- Make demonstration copies of international LM-2 (flag revenue numbers, dues numbers, amount spent on members)
- Make demonstration copies of local LM-2 (or LM-3 for small unions) (flag revenue numbers, dues numbers, amount spent on members)
- Make demonstration copies of international constitution (flag dues, assessment clauses)
- Make demonstration copies of local bylaws (flag dues, assessment clauses)
- Copies of challenge cards for all meeting attendees
- Make copies of the "How to research unions" flyer to hand out at meetings [Optional]
- Insert correct numbers and fast facts from local union's LM-2 into Slide 11 of the "Union As A Business" PowerPoint deck

### Additional Meeting Planning in Right to Work states

- Move the RtW slide (currently #15, located at the end of the deck after the black slide) behind slide number 11 in the "Union As A Business" PowerPoint deck, so that it becomes slide #12.

### Supervision

- Conduct manager training (see Manager Training Checklist)
- Print and post meeting notice