

A LABOR NOTES GUIDE

HOW TO BUILD A UNION REFORM CAUCUS



United Auto Workers

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Sarah Jane Rhee

WHAT IS THIS, AND WHO IS IT FOR?

This is a packet of resources assembled by Labor Notes staff and supporters for union members seeking advice on reform caucus organizing: how to get started, and how to navigate the challenges of developing your caucus.

Conference is where fledgling and established caucuses form, meet, grow, and cross-pollinate.

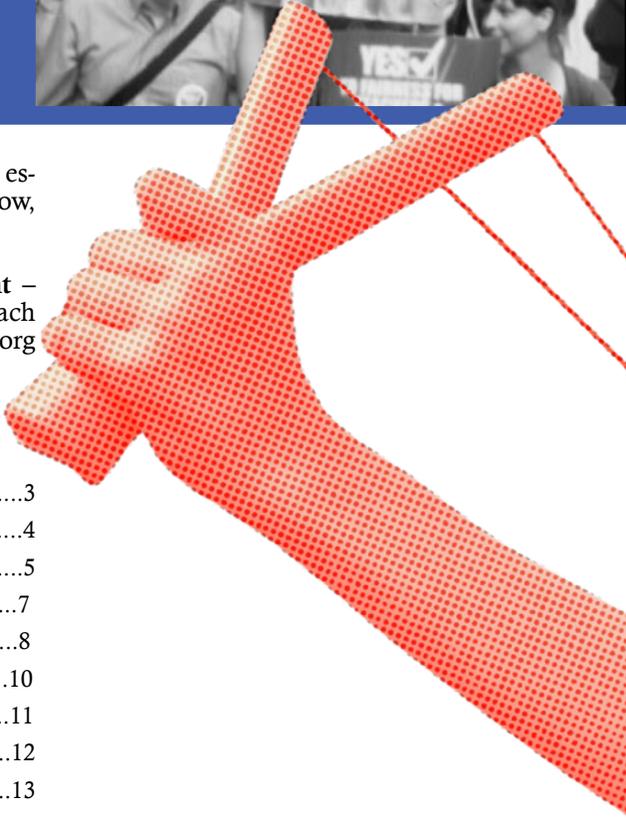
This packet is a living document – stay tuned for ongoing updates! Reach out to us at labornotes@labornotes.org with any questions or comments.

What is Labor Notes?

Since its founding in 1979, Labor Notes has closely reported on and advised union reform movements including among auto workers, Teamsters, educators, transit workers, steelworkers, grocery workers, longshore workers, rail workers, nurses, machinists, electrical workers, carpenters, city workers, state workers, actors, stagehands, journalists, telecom workers, letter carriers, farmworkers, and many more. Today Labor Notes is the main cross-union resource for union reformers in the U.S., and the biennial Labor Notes

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WHAT ARE UNION REFORM CAUCUSES, AND WHY DO THEY MATTER?

A reform caucus is a group of union members who are organizing together to improve their union, and build its power to effectively fight the boss.

Does it have to be called a reform caucus?

Not all reformers necessarily call their organization a “caucus.” Some may be more informally organized in reform “currents,” or style themselves as a “network” or some other kind of organization. This packet is meant to be helpful to activists in all these kinds of groups, so long as they’re organizing around transforming their union.

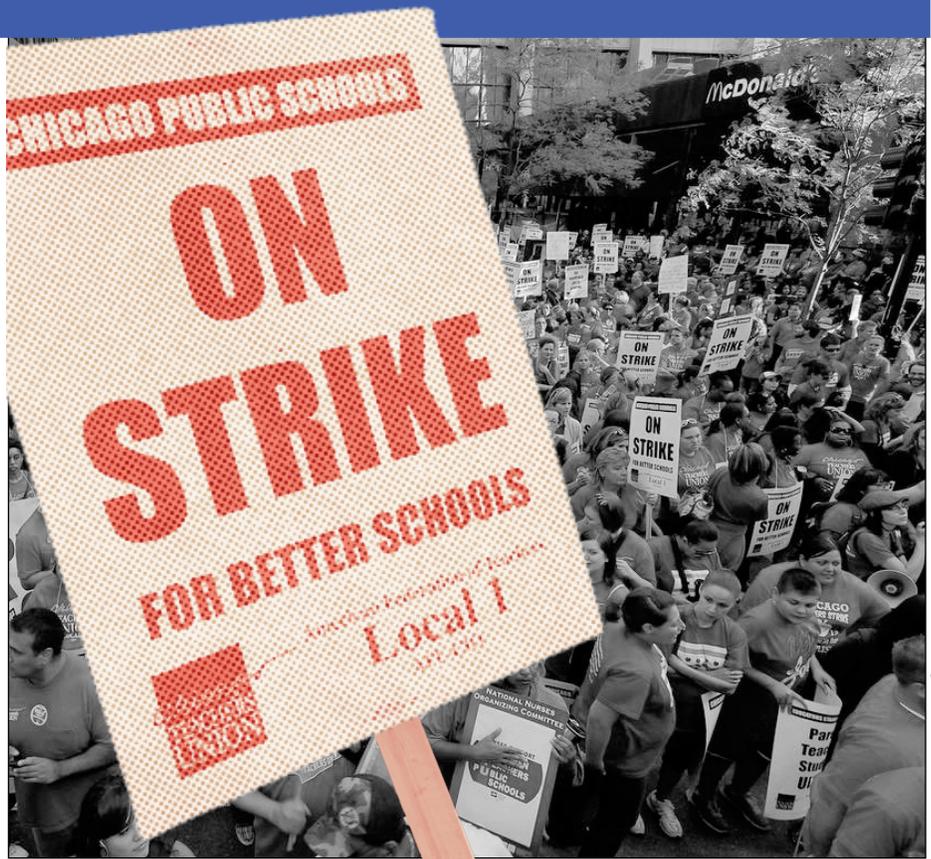
Transformation must occur at every layer of the union. On the one hand, reform caucuses aim to make union leaders more responsive to the needs of the members. This can involve pressuring leaders from below, organizing for democratic reforms, and running for union office.

On the other hand, reform caucuses also have the crucial task of building the fighting capacity of the union by developing rank-and-file activists, helping members learn how to organize, and “being the union” they would like to see. This is often the more difficult task. But without this, changes at the top don’t have lasting effect.

What isn’t a reform caucus?

Any group or committee that addresses itself to a particular group of workers, or is officially sponsored or authorized by the existing structures of the union, usually isn’t a reform caucus. For instance, many unions have a young workers group, or a women’s committee, or a Black members caucus. Sometimes union members form self-selecting groups to back political ideas or candidates outside the workplace.

All these groups serve important functions, and they may overlap with the aims of a reform caucus. However, reform caucuses are aimed at transforming the union as a whole, and for that reason need to address themselves



Chicago Teachers Union

to the membership as a whole. They are asking and answering the question: What kind of union do we want to be?

Reform caucuses are also by their nature usually formed without the approval of union officers. On the contrary, you can usually expect fierce opposition and sometimes threats from official leaders, and you need to be ready to take that in stride.

Should I form a caucus?

Not everyone should start a reform caucus, nor is every situation ripe for one—yet. We suggest that you take a look at the next two sections, Principles of caucus organizing and Getting started, to assess whether you and your fellow organizers are on the same page on your goals and how you should approach reform organizing. Is there more groundwork that needs to be laid? Or are there other things that you haven’t tried yet?

In Ellen David Friedman’s article [“What to Do When Your Union Leaders Break Your Heart,”](#) the first

step, regardless of whether you end up forming a reform caucus, is to start talking to your co-workers about improvements that can be made, and then talk directly to union leadership together, in a calm, strategic way. (Ellen, a longtime Labor Notes organizer, serves on the board of Labor Notes and also runs the popular monthly workshop based on the article called “What to Do When Your Union Breaks Your Heart.” She is the author of a Labor Notes book coming out in 2026, *Keep Going: A Guide to Organizing When It’s Hard.*) If these efforts are not successful, then it may be time to organize more seriously.

Reformers are doing crucial, necessary work in the labor movement.

Union reform caucuses have played—and continue to play—a critical role in the revitalization of the labor movement in the United States and beyond. When a union does change for the better, it is often the result of patient, unsung

work by dedicated members organizing together over a long period of time, often decades. In the same way that an organized political party or movement is necessary to advance political aims within our broader society, union members also have to be organized to advance aims within their own union.

It is thanks to union reform caucuses that we have seen a new fighting spirit in educator unions, from Los Angeles to Chicago to Massachusetts, and overthrown corrupt leadership in the Teamsters and the United Auto Workers. Historically, reform movements have played an important role in the Mineworkers and the Steelworkers.

New reform caucuses are now sprouting across the labor movement, including in the building trades, the entertainment industry, grocery, the public sector, health care, and beyond.

Right now, we are seeing lots of reform caucuses starting up across different types of unions, and they are learning many lessons along the way. There is no one template for a reform caucus to follow. Some reformers are trying loose networks without formal rules, for example. For that reason, we intend to make this packet a living document, which we will edit and add to over time.

Still, the resources we've gathered

here contain decades of wisdom and experience across various union reform movements, and are the fruit of learning by hundreds of reform activists. We hope they will help ground your organizing in key principles and prevent you from reinventing the wheel (too much!).

If you have a question that isn't answered in this packet, or a comment or a suggestion about reform caucus organizing, please reach out to us at labornotes@labornotes.org. We hope it's useful to you and your fellow organizers!

In solidarity,
Labor Notes

PRINCIPLES OF CAUCUS ORGANIZING



Kinga Borondy

agree with changing the union and are already doing work: stewards, informal leaders, people who speak up at union meetings?

Prioritize building a core group that is diverse, representative of the membership, from the beginning.

- Try reaching out to groups of workers who have been shut out of the union.
- Consider race, gender, job title/tier, and more.

There should be clear responsibility/leadership.

- Who maintains the list? Who is making sure meetings happen? Who reaches out to new people who [email/sign online interest form/fill out petition]?
- This can be more formal (for example, elected) or less formal (volunteers who agree to take on tasks).

Form follows function.

- You don't need to create a bunch of structures at the outset. Instead, create structures as you need them for the work you're doing.
- When you need rules/bylaws/etc., start small and simple. Too much structure can be a burden—and take a lot of time that's better spent organizing.
- You can't fix the union by making a perfect caucus structure. People may get involved in the caucus because the union is undemocratic, and has bad rules and practices. But the solution isn't to adopt the caucus constitution that you wish

Whether you're just learning what a caucus is, or you've been in a caucus for decades, we encourage activists to revisit some of the key principles of successful caucus organizing.

If you're having difficulty coming to a common understanding with fellow organizers on the goals of your caucus, or how it should be structured—or if you're concerned that your caucus has lost its way—this section is for you, too.

Here's a document drafted by Labor Notes staff with some important principles to keep in mind when organizing a caucus, or any caucus-like organizing group. It may be a helpful starting point for answering some of your questions: [Some principles for a caucus or organizing group.](#)

Some key takeaways:

The goal of the caucus is to act.

- The caucus grows—in power and

numbers—through taking action in the workplace and in the union.

- The caucus has to be a place where people can talk about their frustrations with the union...
- And it can also be a place where people come to learn about what's going on in the union (contracts, elections, grievances, etc.), especially when leadership keeps a tight hold on information...
- ...but that can't be all it is. When people have talked about their anger and have learned about what's going on, you want them to DO something.

Find the organizers.

- Focus on bringing in people who want to organize, carry out the program of the caucus—not just participate in caucus meetings. [Think about membership with the principle of the bullseye.](#)
- Who is out there who's already trying to make the union stronger? Who are the people who

your union had—it's to organize to make your union better.

Your decision-making process should balance the importance of talking things through with the need to be able to act.

- Consider the potential tension between democratic participation and leadership. Ask, "Is this process going to allow us to both explore questions and move toward action?"
- Create a culture of listening and respect. Caucus members should have the goal of building solidarity and consensus—reading the room, engaging in conversation, and coming to agreement. Be alert to a tendency to exacerbate divisions and polarize.
- When conflicts do occur within caucuses, members should agree on a protocol for resolving them so that the caucus can stay focused on moving forward.
- Don't lock yourselves into a system of decision-making until you've tried it out and seen how it works.

Longtime Labor Notes organizer Ellen David Friedman provides further insights in this document on how to determine your caucus goals and priorities: [Caucus Goals and Priorities](#)
Here is one of the key takeaways:

“A caucus—or union, for that matter—stays healthy by always keeping two questions in the forefront:

- 1) Are we working on solving problems the members care about?
- 2) Are we working in a way that builds the size, capacity, unity, and power of the group?”

The document also covers a number of questions you may be wrestling with early on, like:

Our caucus members can't agree on an issue to work on. What should we do?

Start with a realistic assessment of how much capacity the caucus has to take on an issue campaign. Then consider the strength of feeling behind contending proposals. If there's enough capacity, and the proposals aren't in conflict, then no reason to choose between them; try moving ahead with more than one issue. But don't overextend and invite failure. It's better to take things on in sequence - learning from one effort before going on to the next - than it is to scatter meager forces.

Most union members are concerned about ____, but the caucus isn't strong enough to do anything about it.

To grow stronger, we have to practice

matching our goals to our power. This is nothing to be ashamed of! There will always be problems - small and big - crying out for action. But setting a goal that is realistically not achievable undermines confidence, generates cynicism, and drives people away. By contrast... finding an achievable goal that is a small step on the path to addressing the big problem, can draw people towards the caucus. If successful, you should have more people engaged for the next step... and so on. Be frank with members, and encourage a long-haul view.

Should we prioritize a social media presence?

Be something - really - before you project looking like something on social media. It's not hard to inject material into the social media ecosystem... but that's not organizing. It doesn't build relationships at the worksite level, which is the main source of our power as workers. Instead, reach out through talking and listening, through bringing groups together to think and plan, through testing your collective courage by taking action. Once that is in motion, then social media can tell the story of what you've actually done.

GETTING STARTED

So you're ready to think about starting a union reform caucus. Congratulations!

There's an art to laying the groundwork for a reform caucus, and knowing when to take the first steps. Sometimes the conditions are already there. For instance, you may already have a motivated, diverse network of members across different parts of your union who are ready to take action. They may already be receptive to the idea. Or you may need to do the work to build up more connections first, have more conversations, and take more action before introducing the idea of starting a reform caucus.

You can also learn directly from other union reformers about what they did in the early days. [Watch this recording](#) of a Labor Notes workshop with activists from the United Auto Workers, Theatrical and Stage Employees (IATSE), and the Philadelphia Federation of Teachers on how they got started.



FAQ

For a set of frequently asked questions that may arise around starting a caucus, check out these “Caucus How-To” guides drafted by Ellen David Friedman.

- [Early Organizing Days](#)

- [Basic Logistics for Starting a Caucus](#)
- [Common Problems at the Start](#)

You can also refer to our flow chart on the following page: [Do We Need a Reform Caucus?](#)

Our union isn't fighting for its members. DO WE NEED A REFORM CAUCUS?

A handy Labor Notes guide!



HAVE YOU EXHAUSTED THE ALTERNATIVES?

We've tried to calmly approach union leadership with our concerns, and tried to transform our union through existing committees and union spaces.

See "What to Do When Your Union Leaders Break Your Heart", by Ellen David Friedman, Feb. 14, 2020

NO

TRY THE EXISTING CHANNELS FIRST.

If this doesn't work, move forward.

YES, AND IT DIDN'T WORK

WE'VE LAID THE GROUNDWORK FOR A REFORM GROUP

We've launched at least one campaign on a workplace issue that workers care about (pay, safety, etc.) to challenge management and bring reform-minded workers together.

YES, AND WE BUILT SOME MOMENTUM AND A LIST OF MEMBER CONTACTS

NO

YES, WE HAVE A PROMISING GROUP OF REFORM-MINDED LEADERS

We've identified other worker leaders who are broadly representative of the workplace and who want to fight for a different kind of union.

NO

BUILD STRENGTH AND TRUST

Organize independently of union leadership to win gains from the boss on a workplace issue, and build a representative organizing committee.

WE AGREE ON A COMMON VISION

Our group agrees on a basic vision of the union (e.g. stands up to management, democratic, involved membership) and some key tactics to focus on (e.g. trainings, contract campaign, leader elections)

NO

Find enough agreement on the kind of union you want to fight for, and what it takes to get there. If you can't decide that yet, keep finding actions you can agree on.

Whatever structure you agree on, it should serve your organizing goals. Don't get stuck on bylaws!

YES, WE HAVE BASIC AGREEMENT ON THE GOAL OF OUR ORGANIZING AND STEPS WE SHOULD TAKE

NO

CONGRATULATIONS!

Check out the rest of this caucus packet for more resources on union reform organizing.

YES, WE'VE MADE THESE DECISIONS, AT LEAST FOR NOW

DECIDE ON THE FORMAT OF YOUR GROUP, LETTING ACTION BE YOUR GUIDE

Our group has discussed what we need to do based on our organizing conditions.

CAUCUS vs. NETWORK: Would we benefit from keeping our organization looser for now?

MEMBERSHIP: Do we need formal membership? What are membership requirements, and how do we approve new people?

PUBLIC vs. PRIVATE: Do we need to build up more before we launch publicly?

BRINGING PEOPLE IN AND EXPANDING YOUR REACH

Are you having trouble increasing the size of your caucus? Do you feel like you're reaching the same people over and over again? How do you stop preaching to the choir, and expand your reach?

Or perhaps you need to expand the size of your caucus leadership team. How do you bring in more activists into the leadership layer of your caucus, and ensure that you have enough people doing the work?

First, it may be helpful to revisit the [Principles document](#) linked to earlier in this packet, and make sure you haven't set up your group in a way that makes it difficult to grow your support or get more members involved.

Key lessons on how to bring people into your caucus (or any organizing effort!) can be found in the Labor Notes book [Secrets of a Successful Organizer](#). If you haven't read the book, this may be a good first step to take with your fellow caucus organizers.

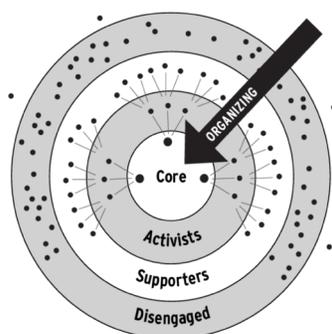


Labor Notes also offers the accompanying three-part Secrets training several times a year online—which includes “Beating Apathy” and “Assembling Your Dream Team”—and also in person at Troublemakers Schools and the biannual Labor Notes Conference. Check our [events calendar](#) for the next opportunity to register.

In particular, note the bullseye from “Beating Apathy.” Your task as an

organizer is to bring members closer to the bullseye. See our article on the subject [here](#), and our accompanying handout [here](#).

AIM FOR THE BULLSEYE



Five takeaways from the Expand Your Reach training

When it comes to growing your caucus and expanding your reach, another skill to master is list-building. This means making and continuing to add to a list of relevant members of your workplace, learning how to analyze it with respect to your workplace structure, and using it to communicate with members and develop activists. The Labor Notes training “Expand Your Reach as a Troublemaker” covers these topics. You can view the slides [here](#).

What should a list consist of? Again: always, always be thinking about the bullseye. Your list is how you keep track of who is in each ring of the dartboard, and how you can contact them.

Logistics of keeping a list: Store your list in one place (ideally a spreadsheet) that the members of your organizing committee can collaborate on. Make sure there are members who are clearly responsible for regularly adding to the list, and maintaining it and keeping it clean. Set a regular time for list adding!

How to grow a list: Some of the most important tactics for growing a list include adding contacts you already have in your personal networks; collecting contact info through forms like petitions, pledges, and surveys that speak to widely and deeply felt issues; and always gathering contact info through event registrations.

How to make the most of your list: Use it to communicate regularly with your supporters, assess the strengths and weaknesses in your organizing structure, identify potential leaders, and turn supporters into activists.

Remember the purpose of a list: Listbuilding is not an end in itself. The goal is to make your campaign stronger and to build mass participation.



Essential Workers for Democracy

ORGANIZING FROM BELOW: THE CORE OF CAUCUS ACTIVITY

What does your caucus need to do to transform your union? Organize from below!

Caucuses should organize the rank and file to act like and fight for the union we want to be. This often means organizing a contract campaign when leadership is shutting you out of bargaining, or taking on the issues people care about that leadership is ignoring. It can also mean pushing for those vital democratic reforms the union needs, as well as providing critical training and member education that your leadership isn't.

Organizing from below is how caucuses make meaningful change, empower members, develop leaders, and ultimately build their power. Below, we've included links to articles with great examples of organizing from below by caucuses.

Fighting for better contracts

One of the most important ways a caucus can lead by example is by intervening in contract fights. Here's a guide from Ellen David Friedman on how caucuses can effectively organize from below to win better contracts: [How Caucuses Impact Bargaining](#)

Here are some examples of caucuses and rank-and-file groups raising expectations among the membership, organizing contract campaigns from the bottom up, and agitating to "vote no" on subpar contracts:

- [‘Vote No’ Movement Sends UPS Bargainers Back to Table](#)
- [UPenn Teamsters Defeat Two-Tier](#)
- [8,000 Indiana Kroger Workers Vote Down Contract a Second Time](#)
- [Letter Carriers are Organizing Against an Insulting 1.3 Percent Raise](#)
- [IATSE Members Launch Reform Caucus as Hollywood Strikes Wrap](#)

Taking on the issues that members care about

Caucuses can also grow and transform their unions by organizing around issues that are widely and deeply felt on the shop floor. Here's another guide from Ellen David Friedman on how reformers can lead the fight on these issues from below: [How Caucuses Impact Member Representation](#)

And here are examples of caucuses that have successfully done this:

- [In Battle for Virtual Schools, Rochester Teachers Caucus Leads From Below](#)
- [New York Pre-K Workers Fight for Their Jobs, In Spite of Their Union](#)
- [North Carolina Electrical Workers Gear Up for Jobsite ICE Defense](#)
- [How We Began To Bring the Mail Back](#)
- [No one Else Was Going To, So These Teamsters Saved Their Own Pensions](#)

Organizing for democratic reforms

Reform caucuses have always fought to make their unions more democratic and transparent, and in many cases, against outright corruption. Here are some examples of fights some caucuses have taken on:

- [Teamsters Secure Their Right To Vote, In Time for 2016 Election](#)
- [Winning the Right to Elect Stewards](#)
- [Auto Workers Win Direct Democracy in Referendum](#)
- [Auto Workers Turn a Corner for Strike Pay and Democracy](#)
- [Rail Workers Push for One Member, One Vote](#)



Gary Pena-Santos

- [Momentum for Open Bargaining Grows in the Letter Carriers](#)
- [Texas Electricians Open Up Negotiations and Win Big](#)

Educating, training, and bringing together union members

Educating and training members is also a crucial part of organizing from below, as is giving members space to network and commune. Filling the gap in training members on how to organize and tackle their issues is a key area where caucuses can act like the union. For instance, the Movement of Rank-and-File Educators, a caucus in the New York City teachers union, builds its bench by training building representatives (equivalent to shop stewards). This can also be an important way to bring new members into the caucus and expand the reach of the reform movement.

Caucuses may run their own trainings for union members (note that Labor Notes also runs many workshops with overlapping content as well). For example, here are examples of recent trainings put on by UAW Member Action, an organization of reformers in the United Auto Workers.

- [Steward Stories: Our Toolkit Beyond the Grievance](#)
- [Skills to Strengthen Your UAW Local](#)
- [Legal Rights of Union Representatives](#)

(UAW Member Action is the successor organization to the caucus Unite All Workers in Democracy, or UAWD, which dissolved over internal differences in 2025.)

[Here are links to recordings of Teamsters for a Democratic Union's \(TDU\) past webinars](#) on topics spanning contract campaigns, winning grievances, and organizing to enforce health and safety standards.

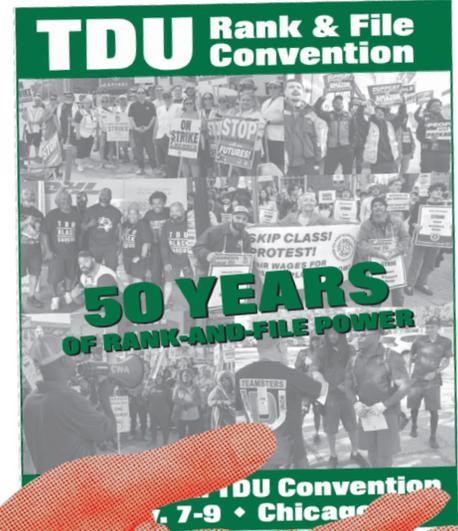
Of course, many caucuses also run in-person trainings, where feasible. Essential Workers for Democracy (EW4D), which organizes in the UFCW, has run regional workshops on preparing for contract expirations:

- [NorCal Grocery Rank and File Gear Up for Contract Expiration](#)

Education and networking can also take the form of a caucus convention or conference. Successful conventions typically focus on educational programming, including workshops on organizing skills, topical panels, and keynote speakers, as well as ample opportunities for members to network and socialize.

TDU holds an annual convention, one of the largest of any caucus; in 2025, it drew over 500 Teamsters to its 50th annual convention. [Here's the link to the 2025 convention program](#), and [an article describing the convention](#).

UCORE, the network of K-12



educator caucuses, has also held a conference every year since 2013. UAWD held a caucus convention in 2024. Here are descriptions of both events:

- [Teachers Union Caucuses Gather to Swap Strategies](#)
- [UAW Reformers Muster Forces to Hold Bosses to Their Word](#)

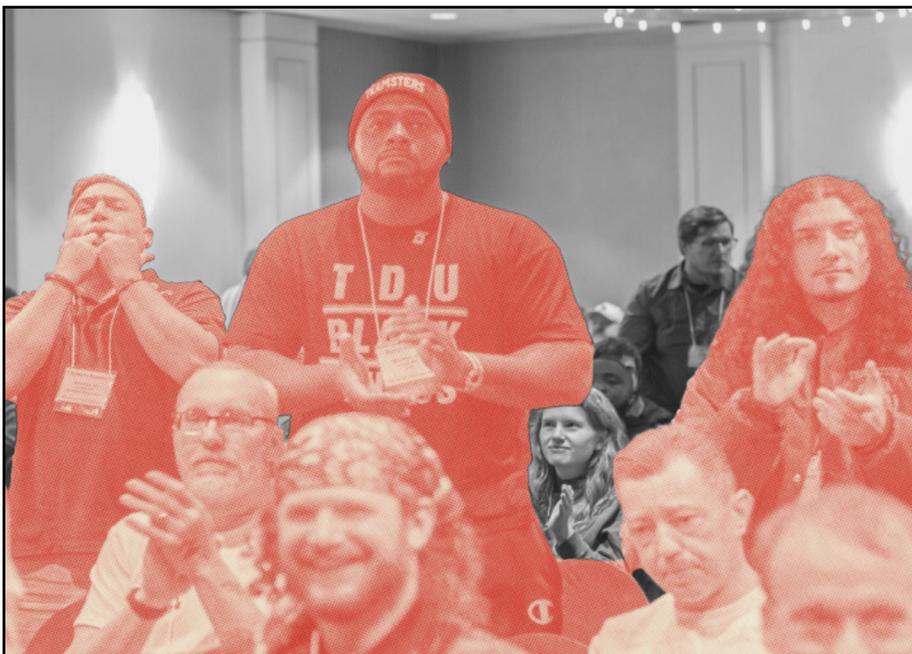
Many caucuses also gather at the Labor Notes Conference every two years, where they have designated meeting times. A number of successful caucuses and networks have in fact had their inaugural meetings at the conference!

Other ways in which caucuses transform unions

Check out further ideas from Ellen David Friedman in this guide: [How Do Caucuses Transform Unions?](#)

Leading from above, as well as below

Another potentially important area of caucus activity is running for office, when you're ready. See the next section of the packet for that.



Jim West

RUNNING FOR UNION OFFICE



Jim West

Why and when you should run

More reformers are desperately needed in union office. But how do you judge when the time is ripe to run?

First, you want to prove that a different kind of union is possible in practice. When reformers win, it's usually after years of laying the groundwork. That means building a team—hopefully a local caucus—that helps members win shop floor fights against the boss, or puts on organizing workshops and socials that members are hungry for. You need to run on more than personalities and big words. It's best to run on issues where members are already fighting, backed by a team that has credibility in every corner of your local.

Even once you've got a good team and some organizing wins under your belt, you might run and lose. That's okay. Many insurgent candidates don't win on the first try, and campaigning can be a valuable experience to learn from and grow the group.

However, there's a right way and a wrong way to lose. If you focus your campaign on how bad the incumbents are, a loss just shows they were still popular—and you weren't. If you lead with sharp proposals to fight the boss and build the union, then even when you lose, sometimes the old guard is pushed to try them.

You can also use your campaign to popularize widely and deeply felt demands, and most importantly, build an activist base and a contact list for your reform fights and future campaigns, since this is how you'll transform the union. If you come up short of winning but still do reasonably well, your campaign will show that there is real support for a reform agenda, and will undermine the sense that incumbents have an iron grip.

But if you run and lose very badly, it can unfortunately undermine confidence in the reform movement, and reinforce the perception that incumbent leadership cannot be successfully challenged. You want to appear viable, not marginal. And there will be other productive ways to build your caucus in the meantime.

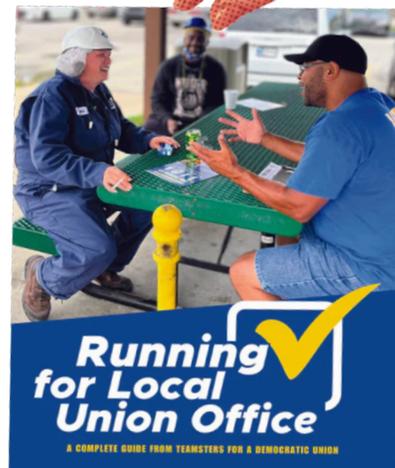
How to run and win

So if you decide to run, how do you run the best campaign you possibly can?

First, if at all possible, get a head start. Begin your planning a year or more in advance of your election date if you can. For large-scale campaigns, you may want to begin even earlier.

Check out the advice in this book from TDU (Labor Notes will also be reissuing our own updated version of this book in 2026):

- [BOOK: Running for Local Union Office: A Complete Guide from Teamsters for a Democratic Union](#)



Labor Notes periodically holds Running for Office trainings based on these materials. [Here are the slides from the training.](#)

Here are additional articles about running for office:

- [Laying the Groundwork Before You Run](#)
- [Building a Team to Win Local Office](#)
- [Campaigning for Union Office \(excerpt from How to Jump-Start Your Union\)](#)
- [Take the High Road](#)

A word on alliances and coalitions: In many cases, your caucus may consider whether it is strategic to enter into an alliance with potential allies outside of the caucus who are running for office. Winning and maintaining power in elected office often requires broader coalitions of aligned supporters. Your caucus should talk through the pros and cons of such alliances, and how they might serve to advance your goals of transforming the union.

If you run and win, congratulations! No matter how nasty the election was (and it was probably pretty nasty), the hard part is still to come. See the next section for important pointers on being a reform leader in office.

CAUCUSES IN LEADERSHIP

The candidates that your reform caucus backed have actually won union office! Congratulations! Whether this happened on your first or tenth try, however, you may feel like the dog that caught the car. What now?

In this section, we'll discuss two of the most important questions you should try to answer: 1: How should the caucus relate to the newly elected leadership? 2: How should elected reformers behave in office to keep reform on track?

How should the caucus relate to the newly elected leadership?

A caucus that wins elected leadership in a local will face numerous challenges. Some of these challenges will depend on the strength of the victory (e.g., do you hold a strong majority on the representative body?) and the level of dysfunction in the union structures before you took the reins.

In many cases, while the caucus may have successfully run candidates for office, it still remains relatively weak as an organizing force within the union. (Your caucus may even be weaker than before, if your strongest activists are now busy holding union office.) It's important to realistically assess where you stand now relative to elected leadership, and how you can act most strategically.

Taking all of this into account, here are some general pointers:

- **To the best of your ability, maintain the caucus as an entity distinct from elected leaders, who will experience an inevitable pull toward the status quo.** The platform and vision that won the election must continue to guide discussion and action. A strong caucus that meets regularly, stays focused on rank-and-file activity, and communicates goals and priorities to elected leaders is essential for resisting the gravitational pull of “the way things have always been done.” The reality is that many caucuses have not been successful at maintaining themselves after getting elected, to the detriment of

the ongoing project of transforming the union.

- **Create a system for caucus members to discuss and debate issues and the direction of the union.** Include elected leaders in these discussions and debates; make them robustly democratic. There will be tension between supporting and challenging elected leaders. Discuss this tension openly, and make decisions understanding that, while the caucus wants to support the elected leaders, there can and will be times—subject to a realistic assessment of the strength of your caucus—when the caucus needs to push them. Prior to winning the election, you were dissidents. Moving from being dissidents to leading the union requires a balance between supporting leadership and holding to your platform.
- **Expect that the elected leaders will experience enormous pressures to do things the old way and will be overwhelmed with the demands of running the organization.** Elected leaders should do everything they can to spend time with members. It is the key antidote to managing the pressures of the bureaucracy.
- **Beware of getting pulled into caucus strife/issues that distract you from internal union organizing.** Members are less interested in caucus board dynamics than you are. The caucus needs to continue base-building and rank-and-file organizing.
- **Members will understand the caucus's vision** if you lead workshops and reading groups about it, and commit to democratic practices in the union and the caucus.

In addition, check out Ellen David Friedman's advice on the same topic: [The Role of the Caucus When Holding Union Leadership](#)

How should elected reformers behave in office to keep reform on track?

You were elected by the membership to run the union differently than your predecessors! Yet as soon as you get into office, you may encounter many of the same pressures that previous leaders succumbed to. For instance, you may face pressure to cut deals with powerful figures, and to cut yourself off from your commitments to the membership in the process.

Explore this pitfall by reading [this Labor Notes article by Barbara Madeloni](#), who won the presidency of the Massachusetts Teachers Association on an insurgent slate backed by the Educators for a Democratic Union (EDU) caucus. (Barbara later joined the staff of Labor Notes.)

Reformers who are newly elected into office, especially those who win by a narrow margin or who are perceived as being isolated, will likely face strong opposition and dirty attacks. It may be difficult to stay focused on your positive vision for the union in the face of these attempts to distract you (and the members) from the work that needs to be done.



[Here's a comprehensive article from Labor Notes co-founder Jane Slaughter](#) with a number of important lessons for reformers elected to office, gathered from interviews with various union reformers. Key topics include: picking the right team to run with, prioritizing developing other leaders, building shop floor action teams, investing in training stewards, carefully choosing mentors, and more.

DEMOCRATIC RIGHTS FOR REFORMERS

What do union reformers need to know about the law, and the protections you have as a union dissident?

The first thing to know is that your strongest protection against the violation of your rights is always **organizing**, rather than legal recourse.

That said, many union members do have rights under the law. In the U.S., the [Labor Management Reporting and Disclosure Act of 1959 \(LMRDA\)](#) is the key federal law that guarantees the democratic rights of union members in the private sector. The first relevant section for union reformers is Title I, also known as the Union Member's Bill of Rights. Some key protections include equal rights to participate in union activities; freedom of speech and assembly; voice in setting rates of dues, fees, and assessments; protection of the right to sue; and requirements for due process in internal disciplinary hearings.

[Here](#) is a summary of the Union Member's Bill of Rights from the Association for Union Democracy (AUD).

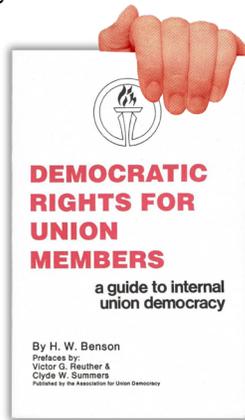


Labor Notes has also begun offering a recurring training on the LMRDA called [Democratic Rights for Union Members](#), facilitated by union democracy lawyer Will Bloom. Check the Labor Notes event page for the next training. It focuses on Title I, but also Title IV, which contains the rules governing union elections.

What if you're a public sector worker? Depending on the state you live in, the

LMRDA may apply to you as well. It may also apply if your union includes both public and private sector workers.

But regardless of whether or not you fall under the jurisdiction of the LMRDA, the best defense against repression from union leadership is organizing and strength in numbers. Legal cases can take years to resolve. **Do not pursue union reform as a lone wolf! Organize and build a movement with your fellow union members.**



[Here's](#) an excerpt from the book Democratic Rights for Union Members by the late Herman Benson, the founder of AUD, on the importance of not going it alone. (See more about the

AUD below.)

Another topic that commonly comes up is your rights when facing internal union discipline. [This](#) article from union democracy lawyer Cathy Hight covers important things you should know.



Finally, if you have specific questions or are looking for a lawyer specializing in union democracy issues, we highly recommend that you reach out to the [Association for Union Democracy \(AUD\)](#), "the only national, pro-labor, non-profit organization dedicated solely to advancing the principles and practices of democratic trade unionism in the North American labor movement." AUD has access to a network of union democracy lawyers, and provides additional resources, publications, and books on their website. Labor Notes partners with AUD on events and trainings.



Newton Teachers Association

UNION CONVENTIONS

International or statewide union conventions can present important opportunities as well as challenges for reformers. In most unions, they only occur every four or five years, so it's worth planning your approach to the convention well in advance. Typically, delegates to a convention gather to vote on resolutions shaping the direction of the union, and on amendments to the union constitution, and to nominate top union officers. In the majority of unions, where the members don't elect officers directly, delegates vote to elect top officers as well.

Chances are that your union convention is dominated by the entrenched leadership of your union, and is in fact a critical tool that the "old boys club" has long wielded to maintain control. The convention will be long on useless pageantry and votes that are effectively rubber-stamps. Many delegates are local officers or even paid staff who must fall in line in order to stay in the good graces of top leadership.

This means that reformers need to strategize carefully. In many cases, your primary goal will not be to pass every resolution you've campaigned on, or to elect candidates (unless your caucus has built up a lot of power!), but to agitate around deeply and widely felt issues, shine a spotlight on undemocratic practices, and use the opportunity to build the reform movement. You'll also want to put forward positive ideas for improving the union, rather than just criticize the incumbents.

Here are some questions to consider:

Delegate elections:

- What is the timeline for delegate elections in local unions? How competitive are they? Can you recruit reformers to run as delegates?
- If you are successful, how big will the "delegation" of reform-minded delegates be, and how will you coordinate with them?

Resolutions and amendments:

- What kinds of reforms does your union need? What kinds of reforms does it make sense for you to agitate around, in order to build the reform movement? (The answers will probably overlap but may not be the same!) Try to pick issues that matter to the average member.
- What is the process for bringing resolutions to the floor of the convention? If it involves passing them first in local unions or gathering broad support, how can you use this as an opportunity to popularize a reform agenda and enlarge your movement?

Officer nominations and elections:

This is a much bigger topic (see the Running for Union Office section above), but you will need to assess whether it makes sense to run any reform-minded candidates for office.

- If so, what is the nomination process?
- If it's a delegate vote, how will you get commitments to vote for your candidates?

The reform movement's presence at the convention: Regardless of whether you actually have any delegates, resolutions, or officers, your presence at the convention is still important. A convention can be an important opportunity to organize sympathetic members who happen to be present, and to communicate and agitate among the membership.

- Who can you send to convention, even if they're not an elected delegate? How will you organize yourselves there?
- How will you reach out to delegates and other members who are present? How can you find like-minded people from other locals?
- How will you communicate what is happening at the convention to the rest of the membership?

For more advice and tips on how to approach a convention, check out our

resource: [Notes for Reform Caucuses and Union Conventions](#)

Here are examples of how other reform caucuses have approached union conventions:

Teamsters for a Democratic Union at the 2021 Teamsters Convention

- [At a Convention Like No Other, Teamster Challengers Turn a Corner](#)

UAWD at the 2022 UAW Constitutional Convention

- [UAW Delegates Head to Convention and Prepare for First Direct Elections](#)
- [Auto Workers Turn a Corner for Strike Pay and Democracy](#)

Essential Workers for Democracy (EW4D) and UFCW reformers at the 2023 UFCW Convention

- [UFCW Reformers Look to 2023](#)
- [UFCW Convention Starts: Assets Up, Membership Down, Reformers in Motion](#)

Build a Fighting NALC and other Letter Carriers reformers at the 2024 NALC convention:

- [Letter Carriers Convention Shapes Up to Be Open Bargaining Showdown](#)



FUNDRAISING

In the beginning, your caucus may not have many expenses. However, as it grows and begins to pursue more ambitious goals—like running for office, or hiring staff organizers so you can build organization across thousands of members—you will need to consider developing a serious fundraising strategy.

Fundraising can be divided into two types: grassroots and major donor fundraising.

Grassroots fundraising:

Historically, union reformers have relied almost exclusively on grassroots fundraising. [We have collected some advice on grassroots fundraising here](#), based on previous experience fundraising for union reform caucuses.

Here's an excerpt from the guide:

The most important concept: is to treat fundraising like organizing! Many of the same concepts apply—like how to bring people in, and build support for your project. You know how to organize. Hence, you will also be able to fundraise.

Here are some questions to answer:

What's your pitch? First, make sure to think big: your big plans to transform your union, the lives of your coworkers, the labor movement as a whole. You want to inspire your audience. At the same time, it's good to provide some details on compelling concrete projects (hiring staff, printing leaflets, etc.) to show that you have a plan. You'll want to write up all of this briefly in some pithy fundraising copy that you can use and reuse.

Who would be willing to give you money? It's worth doing a wide-ranging brainstorm on this question. Make an actual list of specific people, as well as categories of individuals. Certainly, members of the caucus, as well as friends and family. Crucial support for reform caucuses has also often come from supporters of the labor movement beyond your own union, including allies on the left and committed activists in other unions.

How much do you need to raise, and by when? Set a goal and a timeline for yourself. Try to stick to it to maintain accountability, but reassess if needed. Importantly, this can also be motivating to donors—deadlines create a sense of urgency.

Another key thing to remember is that grassroots fundraising tends to be more sustainable if you only do a few campaigns a year, as it can otherwise become exhausting both for those doing it and those being asked. To avoid burnout, choose your campaign times carefully.

Which tactics will work best for you? See the list below [in the full guide]. It will depend on how much time and capacity you have, who you can bring into your fundraising team, what other resources you have access to (venues, etc.).

Who will do the fundraising? You may want to set up a fundraising committee within the caucus to coordinate the work (though consider including allies outside of the caucus, as appropriate). However, fundraising is like organizing—you'll ultimately need to draw on the capabilities and relationships of many members in the caucus. Everyone should pitch in, at least a little. When you first meet as a committee, a useful thing you can do to begin the brainstorming process is to ask yourself: "Why do I personally give money? How do I feel when I give money to causes I care about? What tactics work best with me?"

Major donor fundraising:

In recent years, some opportunities for major donor fundraising, whether from individual donors or foundations, have also emerged. If you're interested in advice on navigating this landscape, reach out to Labor Notes.

But grassroots fundraising remains the bread-and-butter of how most union reformers fund their movements. Regardless of whether you pursue major donors, mastering the basics of grassroots fundraising—which has a lot in common with organizing in general—is essential.

Thoughts? Feedback? If you're taking up this work in your own union, we want to hear from you! Reach out with any thoughts: labornotes@labornotes.org



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