



2011 STRATEGIC DEVELOPMENT INITIATIVE FINDINGS AND REPORT

Compiled by Delegates Attending the
40th Annual
International Convention

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CBTU 2011

STRATEGIC DEVELOPMENT INITIATIVE PROJECT

FINDINGS & REPORT

Background and Process

Delegates and members of the Coalition of Black Trade Unionists gathered for the 40th annual convention. During this momentous occasion the leadership, membership, and partners embarked on an ambitious plan to reflect on the strengths and accomplishments of CBTU, discussed external factors influencing CBTU, identified growing opportunities for CBTU, and developed Strategic initiatives to move the organization forward. The following report stems from responses to group dialogue and small group discussions focused on those reflections and critical thinking to move CBTU forward towards another amazing 40 years.

Using the SOAR (Strengths, Opportunities, Aspirations, and Results) method participants generated a tremendous amount of information and ideas. They generally captured the spirit of the mission, purpose and vision of CBTU. This report will include the major findings, summary, and information from the SOAR. It will also present SMART (specific, measurable, achievable, realistic, and timely) goals and objectives for implementation at each level of CBTU for each of the strategic initiatives developed.

Summary of Findings

Strengths and Achievements

Participants identified the strengths and achievements of CBTU; subsequently the initiatives that follow fall in line with continuing and expanding the things CBTU does well, re-visioning its work, and enhancing CBTU's engagement beyond its current constituent force.

The following represents the areas of strength and lists extensive (but not exhaustive) and specific achievements of CBTU both internationally, nationally and at the regional and chapter levels over the last few years.

ORGANIZATIONAL IMPACT

CBTU has been in forefront of national diversity efforts

CBTU website went live

Opportunity to set Direction for next Forty years

CBTU started under 40 groups

CBTU is still functioning

CBTU Has Valued international activities including (but not limited to) Mandela and Free South Africa movements, Haiti initiatives, Canadian engagement

MEMBERSHIP GROWTH

*Organize other workers
Increasing chapters by 100 members
Recruiting new members*

POLITICAL INVOLVEMENT

*Labor helped elected NDP; Canada NDP-37-104 seats
Westchester Labor and CBTU org a massive GOTV campaign
Marie Clark Walker Elected to Canadian Labor Congress Highest African Canadian in labor and CBTU member
Increasing Minority Voting
Labor solidarity and community incorporation around Presidential election 2008--electing Obama
Elections 2008/2010 Networking, Mobilization, GOTV, Voter registration
Healthcare Reform
Changing locations of polls to LV Principles*

YOUTH

*Back to school Youth Jamboree
Provide college scholarships to youth
Scholarships supporting Youth following in footsteps
Encouraging Youth to accomplish educational goal/ Influencing peer groups*

WOMEN'S ISSUES

*Domestic violence and women's health issues highlighted in Rochester NY
Blanket for premature babies, Breast cancer walk for life
CBTU is cutting edge of Women's issues*

COMMUNITY/CIVIC INVOLVEMENT

*Supported veterans hospital
Helped to pass school budget
CARAT Team
Holiday box of Socks
Organizing Community Clergy groups
Haiti fundraiser
Census 2010
HIV/HPV Education
Building finances Organization expansion in partnership with community
Organizations*

RALLIES

*Rallies for jobs issue sin community
One Nation Rally*

STATE/CHAPTER SPECIFIC ACTIVITIES

CA- scholarship Awards

CBTU Illinois went to state leaders to end practice of hiring and firing temp workers w/out benefits and voice

Cal-Food to support needy families/ toys/ Clothing

Detroit-Science Center trip for poor needy neighborhood

CBTU Michigan-w/labor state amity labor measure

Capital District Library films of We Are One

Building social network

Membership Drives for CBTU

LABOR UNION SPECIFIC ACTIVITIES

Resolution to Buy American

CSEA Next Wave Campaign to get Union members under 35 active

Ontario Federation of Labor & Latin American trade Union congress sponsored workers of color conference

OAPSE lead fight to take Ohio back to Democrats in 2013

We are One Campaign

Delegation sent to Wisconsin to support workers struggle

Opportunities

The large and small work groups spent time discussing the possibilities facing CBTU looking towards the future. The purpose of looking at opportunities is to help guide thinking and movement towards identifying strategic initiatives and goals for the future development of CBTU. The summary list of the categories and ideas from which CBTU can navigate and expand both its outreach and influence are listed here:

- 1. Focus on community involvement and faith based organizations**
- 2. Mobilize for 2012 election and develop our own candidates**
- 3. Branding CBTU Chapters and broaden membership**
- 4. Keeping locked out/unemployed/striking members engaged in the struggle**
- 5. Utilizing technology Facebook, twitter**
- 6. Recruiting new and younger members with mentoring**
- 7. Educating the public about unions**
- 8. Using economic attacks to engage and activate**

Trends

Trends and obstacles were also discussed in the small groups. This discussion helped to shape the realistic goal setting for the following strategic initiatives (aspirations). The purpose here was not to evaluate, qualify, or quantify the challenges faced by CBTU, but instead to acknowledge there are always challenges but instead of focusing attention there we instead focus on realistic approaches to meet our mission, goals, and objectives understanding CBTU will, like any other entity have to face obstacles and challenges boldly, rationally and realistically.

Strategic Initiatives (Aspirations)

Based on the existing strengths, achievements, and opportunities the members of CBTU addressed the task of realistically establishing initiatives that the membership could and would commit to implementing over the next year to move CBTU forward. These are established as blueprints or guidelines for chapters, regional units, and the international body to implement at various levels to achieve a larger, significant, and impactful CBTU. From all of the members who participated over two days the following strategic initiatives were identified. From these will follow goals and objectives for implementation between 2011-2012. Aspirations are:

Five Strategic Initiatives

Young Worker & Youth Engagement

Mentoring

Young worker /Youth leadership development

Apprentice Programs

Scholarships for young workers

Public School Partnerships

Partnership with community and youth groups

Recruit young workers/youth delegates

Elects young workers/youth to CBTU Executive Council

Utilize skills of young members to develop social media programs

Branding /Marketing & Technology

Media Training/CBTU Media Committee

Social Networking/ Social Media: Twitter, FaceBook, blogs, MySpace, YouTube, etc.

Create a simple and concise message (for example “each one teach one”)

Update CBTU website

Political Action

Political & Voter education

Elected officials Accountability

Lobbying

Veteran and Senior initiatives

- Voter registration
- Screening candidates
- Electing Union officials
- Training and leadership
 - Re-elect President Obama
 - Electing Union friendly candidates

Expand CBTU Outreach and Engagement

- Diversify CBTU organization inclusive of:
 - Families
 - Other Minorities
 - Allied Groups/Coalition building
- Expand base
- Coalition building outside labor
- Expanding Chapters
 - Educating union members
 - Engaging senior members
- Engage and Participate in the community/civic groups

Generate Financial Resources

- Become self-funded
- Grants
- Target fundraising and donations/collections monthly
- Funding our programs

Results (SMART Goals)

The final part of the process included taking the five strategic initiatives and developing goals and objectives for their implementation. The work here represents hours of discussion and debate in an effort to establish a model for the entire body of CBTU to implement across nations, regions and local chapters. These are meant to be a guide for implementation and can be adjusted and adapted as necessary to ensure successful engagement at each level of CBTU. The initiatives listed are not in any particular order and the order does not imply importance.

Initiative: Young Worker Engagement

Goal: Increase by 25-30% young worker engagement and participation through mentoring, scholarships, and partnerships during September 2011 – June 2012.

Objectives:

1. Increase young worker involvement through Mentoring
 - a. Recruit and retain new members
 - b. Increase chapter membership and participation
2. Partnerships
 - a. Expand allies and increase opportunities for member services and recruitment by increasing services and activities for chapters to engage in

3. Scholarship

- a. Ensure young worker advancement and education by increasing advancement of young members in their field and education

Initiative: CBTU Enhanced Branding, Marketing & Use of Technology

Goal: Engage the membership and community through media outreach and within 9 months brand CBTU so that its message appeals to workers of all ages and the community.

Objectives:

1. Create a clear and concise message about who and what CBTU is and does used by the International, Regionals, and Chapters
 - a. Intergenerational message bridging youth , seasoned members, and retirees
 - i. Examples of messages: “CBTU: The People Fighting for the People”, “CBTU: Creating Solidarity for Tomorrow’s Prosperity”
2. Develop a media committee within three months made up of regional representatives
 - a. Train media committee members
 - i. Media engagement and usage
 - ii. Train on use of social media/networking
 - b. Collect data for the update within 3-6 months
3. Maintain and updated website
 - a. Include regional and chapter updates, links to social networks, victories, and calls to action
 - b. Maintain records of website usage including daily hits, membership applications, participation in calls to action
4. Enhanced use of Facebook, Twitter, Blogs, MySpace, YouTube, etc.

Initiative: Enhanced Political Action and Participation through training, leadership, and voter education and engagement

Goal: Expand member awareness, knowledge, and ability to participate in political engagement activities and political processes demonstrated by increased CBTU members identified as actively involved in chapter and local political campaigns.

Objectives:

1. Training and Leadership
 - a. Create mentorship programs
 - i. inclusive of weekend shadow sessions with current leadership and members
 - ii. Establish monthly political action workshops to ensure members will be educated in the political process
 1. Workshops can include(but not limited to) research, GOTV, voter registration, public speaking, strategic planning
 - a. Target activists and members to attend
 - b. Engage union and community activists in working together on political sustainability

2. Voter Education and Engagement to increase voter registration and a more politically astute voter base
 - a. Organize networks with unions, community groups for grassroots education, training, and technology usage to increase
 - i. Include faith based institutions, youth groups, and retirees
 - b. Develop political committees to identify, vet, and screen potential candidates for election
 - i. Identify process for selecting and endorsing candidates
 - ii. Identify union friendly candidate who will be accountable to our issues (e.g. seniors, veterans, etc.)
 - iii. Elect union members to elected office
 - iv. Send out survey and questionnaire
3. Work to ensure the re-election of President Obama
 - a. Increased voter registration
 - b. Educate members and community on issues and past record
 - c. Mobilizing grassroots level through marketing, technology, and social networking
4. Engage in lobbying activities
 - a. Brainstorm and develop structures for lobbying at all levels
 - b. Identify issues
 - c. Identify allies and opponents
 - d. Target elected officials
 - e. Establish a coalition with subcommittees (issue based)
 - f. Educate constituents

Initiative: Increase the power and influence of CBTU through expanded outreach and engagement by membership education and chapter expansion

Goal: Outreach and Member education and engagement so that members will be able to articulate the CBTU mission and goals and develop self-interest rationale for membership in CBTU

Objectives:

1. Create and distribute flyers, booklets, and videos about CBTU
 - a. Establish fund raisers to support education efforts
2. Train members on the use and utility of telephone, internet, twitter, Facebook, for education and new member recruitment and education.
3. Establish education and outreach committee
 - a. Assign an education/outreach chair
 - b. Make all members responsible for education by rotating topic leaders on issues and initiatives.
 - c. Survey members to identify resources available to the chapter/region/CBTU
 - d. Identify and present guest speakers for local and regional meetings
 - e. Set up educational component for each meeting
 - f. Provide food for meetings and door prizes
 - g. Collaborate with local community groups to address membership on CBTU/labor stances on their issues
 - i. CBTU/Labor in churches and other community groups at events, services, and meetings

1. Provide speakers for regular or special events.
4. Expansion of chapter membership and chapter engagement in CBTU and local communities
 - a. Establish a media committee to promote local CBTU chapter, membership, and issues
 - b. CBTU members attend as identify as CBTU at their local CLC meetings
 - i. Wear CBTU paraphernalia (pins, t-shirts, caps, visors, etc)
 - c. Work with school board on addressing students on labor and CBTU
 - i. Develop literature piece specific to local community issues
 - d. Establish mobilization committee to engage members in meetings and actions (for example: could include transportation for members to actions)
 - e. Develop and promote membership in CBTU at local unions
 - i. Identifying rationale for CBTU membership and mutual benefits of membership and engagement
 - f. Develop and maintain and annual membership drive
 - i. Follow up and engage inactive members

Initiative: Ensure Financial Security of CBTU

Goals: Increase the financial stability of CBTU and ensure longevity through on-going funding activities

Objectives:

1. Increase CBTU dues paying members
2. Create CBTU coordinated fundraiser strategy
 - a. Establish and promote CBTU fundraisers
 - i. Dinners
 - ii. International/national/regional/local fundraising events
3. Identity and secure grants to support the ongoing work and mission of CBTU
 - a. Includes local, regional, and national, and international grant procurement
4. Create member giving programs
 - a. Establish regular donor program for members to give tax deductible donations to CBTU
 - b. Set-up link on CBTU.org for donation opportunities

Final Summary and Recommendations

Convened at the request of the President, William Lucy, after a yearlong process that included surveys, assessments, interviews, and discussions with Executive Board members, chapter and regional leaders the 2011 Strategic Initiatives process was developed to engage CBTU members at every level in the organization first to celebrate 40 years of CBTU successes and to begin the process of charting the future of the organization and its influence in the labor movement and allied communities.

Over two days the membership of CBTU discussed the and developed ideas, concepts, goals, and objectives to move CBTU forward into its next season of life. On Thursday, May 26, 2011 approximately 207 members participated in this process; and on Friday, May 27, 2011 approximately 401 members completed the process.

The energy and engagement of the membership was tremendous and far exceeded CBTU expectations, showing an ongoing love, commitment, and determination for and to CBTU by its members. These

initiatives are designed to be implemented between May 2011 and May/June 2012 for evaluation and assessment at the next CBTU convention. The ongoing adjustment and adaptation of these initiatives should happen as often as necessary to keep CBTU moving forward meeting the challenges faced by the organization, the labor movement, and CBTU's allied and partner communities and organizations.

It is therefore the recommendation of the coordinators and facilitators of this project that CBTU, based on the magnitude of the engagement and participation of its membership, wholly adopt this report and agree to implement these initiatives, without haste, to continue moving the organization forward and maintaining significant engagement by its membership.

Facilitators for this process were:

Karen Alford, Willie Baker, Charlie Benn, Margie Brumfield, Zina Burton-Myrick, Selina Durio, Janice Gairey, Derek Grate, Monique Greene, Anthony Harmon, Charles Hines, Taz Hurst, Carla Insinga, Charles Johnson, LaToia Jones, Tyrek Lee, Alan Lubin, Terry Melvin, Fareed Michelen, Roxie Nelson, Vasper Phillips, Jim Price, Jim Reid, Dennis Serrette, Marcus Shepherd, Darrin Span, Linda Stelly, Roosevelt Stewart, Katherine Taylor, Jenissee Volpintesta, Paul Webster, Patricia Williams, & Fred Wright.

Respectfully submitted:

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