Preparing Managers for Bargaining Toolkit

Unionization Phase Two

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| About This Resource *This toolkit is part of a* [*resource collection*](https://www.managementcenter.org/collection/unionization/) *for leaders and managers preparing for a unionization process.*  This toolkit helps senior leadership teams prepare managers for the second phase of the unionization process: preparing for bargaining.  The communication between senior leadership and the rest of the managers at an organization around unionization influences how the process feels for everybody involved. If several managers' meetings have passed since the initial meeting announcing unionization, use this meeting to reground managers in the [Guiding Principles for Managers](https://www.managementcenter.org/resources/four-guiding-principles-for-managers-during-unionization/), and forecast what to expect during phase two of the unioniztion process.  **This toolkit includes:**   * [Sample Managers’ Meeting Agenda](#kix.xb3x9rkpk7kf) * [Talking Points](#kix.9sb4p49hr42c) * [Additional Resources](#kix.i2hru3zg5dry) |

# Sample Managers’ Meeting Agenda

## Purpose

The purpose of this meeting is for senior leadership to:

* Announce and share information about the unionization process
* Provide learning and training materials
* Forecast how managers will be expected to engage throughout the process
* Create space for managers to share questions and concerns

## Outcomes

By the end of this meeting, managers will:

* Understand phase two of unionization and its key components
* Know where to find resources for further learning
* Be informed of key upcoming events and timelines
* Learn more about the role of managers during unionization

## Process (90 min)

1. **Welcome & get settled** (10 min) Share: name, pronouns, one priority for your team this week.
2. **Review purpose & outcomes** (5 min)
3. **Preparing for bargaining** (45 min) *(see* [*talking points*](#kix.9sb4p49hr42c)*)*

* Reminder of our approach
* Unionization phase two: preparing for bargaining
  + Expectations for managers
  + Other key components

1. **Q&A** (20 min)
2. **Other administrative items & closing** (10 min)

## 

# Talking Points

*The following are potential talking points for discussing the second phase of unionization with managers. Pick and choose based on what’s most appropriate in your context.*

## Preparing for Bargaining

### Reminder of Beyond Neutrality Approach & Guiding Principles

* Approach from a pro-union, anti-racist, and mission-driven lens.
* Act from a grounded place.
* Own your power.
* **Know your role.** We’ll spend a lot of time here today.
* Recommit to strong management practices.

### Unionization Phase Two: Preparing for Bargaining

* We’ve reached voluntary recognition! This is a major step, and now we begin phase two: preparing for bargaining.
* The timeline for phase two is generally 3-6 months, and **the status quo period is still in effect***.* Management is required to maintain the same wages, benefits, employment policies, and working conditions. If we want to make any changes to working conditions, we’ll have to notify the union first so they have a chance to negotiate.

#### **Expectations for managers**

* Reminder: All managers will be expected to attend a training on unionization on **[date(s)].**
* Any non-unit staff are “management’s agents”—what you say matters!
  + **Do:** Offer broad support for unions and unionization in general
  + **Do:** Show compassion for your staff and support reprioritization as needed
  + **Don’t:** Engage staff in conversations about the union or bargaining
  + Refer to these resources for more information:
    - [Supervising in a Union Context](https://www.beyondneutrality.org/s/BN-Resource-Supervising-in-a-Union-Environment.pdf)
    - [Management Communication About the Union](https://www.beyondneutrality.org/s/BN-Resource-Management-Communications.pdf)
    - [How to Actually Reprioritize](https://www.managementcenter.org/resources/how-to-actually-reprioritize/)
* All managers are expected to uphold the [Guiding Principles](https://www.managementcenter.org/resources/four-guiding-principles-for-managers-during-unionization/)
* We want to hear your genuine concerns. Please share them in managers' meetings, through office hours, or directly to the Management Bargaining Team (once established) via email.

#### **Other key components of phase two**

* Management and union (separately) set up their own systems and structures. For Management, this includes:
  + Establishing the Bargaining Team, along with roles and decision-making structures
  + Establishing roles and responsibilities for our attorney and consultant(s)
  + Implementing office hours
  + Continuing consistent managers meetings for input
* The union gathers input from unit members, establishes Bargaining Team, and begins to request information needed for bargaining
* We’ll prepare information we need for bargaining and share any requested information with union leaders
* We’ll identify additional areas for learning and training of managers
* Management & union leaders will establish regular meeting times and align on bargaining style

Up next is [phase three](https://www.managementcenter.org/resources/engaging-managers-during-bargaining-toolkit/): bargaining our first contract.

# Additional Resources:

* [Beyond Neutrality’s Overview of the Basics of Each Phase](https://www.beyondneutrality.org/unionization-basics-2)
* [Supervising in a Union Context](https://www.beyondneutrality.org/s/BN-Resource-Supervising-in-a-Union-Environment.pdf)
* [Management Communication About the Union](https://www.beyondneutrality.org/s/BN-Resource-Management-Communications.pdf)
* [Unionization Glossary of Terms](https://static1.squarespace.com/static/651eeddc8d7ed372484d2e59/t/652fed50f8a62778afda7b36/1697639760793/BN+_+Hub+Resource+GLOSSARY+of+unionization+terms.pdf)
* [Managing Through Uncertainty: Strategies for Middle Managers](https://www.managementcenter.org/resources/managing-through-uncertainty-strategies-for-middle-managers/)
* [Perspective-Taking for Stronger Relationships](https://www.managementcenter.org/resources/emotional-intelligence/)
* [What to Expect in Preparation for Bargaining](https://www.beyondneutrality.org/s/Phase-Two-Preparation-for-Bargaining-RTU.docx)