

Running for Convention Delegate

For a Stronger and More Democratic Union

A handbook for union members

Published by the Association for Union Democracy



The Association for Union Democracy (AUD) is a pro-labor, non-profit organization dedicated to advancing the principles and practices of democratic trade unionism in the North American labor movement. We believe that internal democracy makes unions stronger and better able to fight for the rights and interests of working people. AUD promotes membership participation, free speech and fair elections, so that union members can shape and steer the direction of their union.

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1. Introduction

Unions are supposed to be democratic organizations. The right to run for union leadership is part of the history of the labor movement. It is in every union constitution and is guaranteed by federal law. However, in order to make this right a reality, members have to get involved and run for office in their unions.

A. Conventions and convention delegates

Conventions are often the highest decision-making body of the union. Delegates elected from each local vote on Constitutional changes and sometimes the union's top officers and executive board. Since union members don't often get a direct vote on these important union issues, it is the job of delegates to represent the interests of the members in the local who elect them.

Most union members are eligible to run for delegate. Unfortunately, in some unions, no one runs for delegate except the local union officers. In fact, if there aren't competing candidates running for delegate, there sometimes won't even be an election.

Under federal law, convention delegates who will be choosing international officers must be elected by secret ballot by the members in their local. Unions are permitted to designate local officers to be convention delegates – without a delegate election – because these officers have been elected by secret ballot. However, this must be clearly stated in your local's bylaws.

Reality check: in practice, officers in your local may violate these and other legal rules, and tell you, "that's just the way it is." It is up to the members to learn and enforce their rights, and to educate other members. If you believe there is a violation in your local, contact AUD for advice.

How to use this handbook

This handbook is intended as a basic overview of the major points of running for delegate based on the experience of rank and file members from many other unions. However, no book can answer all of the questions that will come up in the course of a delegate election campaign. If you're thinking of running, make sure to contact the Association for Union Democracy early in the process.

B. Reasons members run as delegates

Like any election campaign, running for union delegate can be hard work. But in unions across the country rank and file union members run for delegate in their unions every year. Here are a few of the most common reasons why members should consider running for delegate:

- **Convention delegates vote on important matters affecting member rights**, including changes to the union constitution. There will be forces at the Convention who will want to keep the old system in place, or even take away members' rights. Strong delegates – with a clear program – can protect members' rights and help make the union more democratic.
- **Convention delegates sometimes nominate and vote on international union officers.** Some unions still elect their international officers through the convention instead of through direct elections. If this is the case in your union, running for delegate can be critical in electing union leadership.
- **The Convention is watched closely by active members of the union**, the international, other union leaders, and by the rest of the labor movement. The Convention is an opportunity to get out a pro-democracy, pro-reform message to members throughout the union.
- **Delegate races get members involved** and give you a chance to learn new organizing skills. The process of winning a delegate election and attending the Convention as a rank and file delegate provides excellent experience for future union leaders. After serving as delegate, members gain the confidence and skills to go on to run in local union elections.

C. Important dates

As every union does things a little differently, it is critical to familiarize yourself with your union's constitution to see how often your union holds its international convention, when the next convention is and when nominations and elections are for delegates in your local. Figuring this information out will help you know when to start campaigning. Don't wait. Start early.

If you are having trouble finding this information out, [reach out to AUD](#) or see our [article](#) on union convention frequency.



2. How Delegate Election Campaigns Work

A. The ABCs of election campaigns

Successful union election campaigns have the following things in common:

- A good slate of candidates
- A clear platform and campaign issues that members care about
- A strategic campaign plan
- A member-to-member campaign network
- A well-organized Get Out the Vote effort

As we all know from reading the newspaper, incumbents have lots of advantages in elections. They have name recognition, money, and they have staff and officers they can send out to

campaign. But they don't always win. **Rank and file candidates do win elections**, but they have to make the most of their strengths. What are your strengths? You are on the job, so you are in daily contact with members. You know what issues matter to them. You can offer an alternative to the same old business as usual. Most important, you have numbers - if you build a group. And use tools like a member-to-member campaign network, you can get your coworkers involved and make sure they vote.

B. The ups and downs of delegate elections

If you've ever run for election in your local union, for your local school board or some other elected position, you probably know some of the basics covered in this manual. However, there are some important differences between delegate campaigns and other types of elections. Taking these differences into account will increase your odds of winning.

Positive Differences

- 1. Members are often more willing to vote for challengers in a delegate race than they would be in a local union election.** The main reason is that delegates have a clear, limited responsibility: to defend member interests for a few days at the Convention. Common fears in officer elections, such as that electing new "inexperienced" leadership could jeopardize contracts or benefits, are not a factor in delegate races.
- 2. Democracy and reform can be strong convention issues.** Your track record of standing up for members' interests on the job and in the union is a valuable asset. The key is to focus on your issues and play to your strengths. Many union members want reform, even if they are not actively doing anything about it in their locals. So it is an easy step to win their support in delegate elections.
- 3. Your opponents may not be very well-organized.** They may not take delegate races as seriously as officer elections. In a local election, officers' positions and jobs are on the line in a way that is not true in delegate elections. You still have to campaign hard, though, as officers may campaign more aggressively once they realize they have challengers.

Negative Differences

- 1. Delegate elections are often held at union meetings** which means that turnout will be low unless you have a solid plan to get your supporters to come out. Building a list of supporters and getting out the vote are discussed later in this manual.
- 2. It can be harder to get members interested** in a delegate election than in an officer election or a contract vote. The convention may seem far away, the issues remote. Many

members do not know what delegates do and why they are important. Education can overcome this factor. Let people know why it matters.



3. Laying the Groundwork for Your Campaign

A. Strategic Planning

You have a short period of time to get a lot of work done when you are running in a delegate election. So, the most important thing you can do is to plan carefully.

First: Gather all the important information

Right away, you need to find out the plan for the delegate election.

- the dates and times of the nomination meeting and of the election
- how many delegates will be elected from the local
- all eligibility requirements (See the Appendix for a discussion of eligibility requirements)
- who will oversee the counting of the ballots
- when notices will be sent to members alerting them of the election

If you need it, you should request a list of the addresses of all of the work places where local union members work.

Second: Map your local union

The next important task is to create a map of your local in order to identify the strengths and weaknesses of your campaign. On a large piece of paper, list all of the work places where local union members work and your best estimate of how many members work there. Then, write down your campaign contacts at each site. You should also consider the different shifts and job types at each work place and whether your contacts can reach all of these members.

Third: Talk to every member one on one

Rank and file delegate campaigns win by out-organizing the other side. The key is speaking directly with the members. You and your slate should try to do this, starting with the people most likely to support you. You probably can't do it all yourself. People tend to vote based on the opinions of other people they know and trust. So you should create a network, with inside coordinators at every workplace who will spread the work load and boost your chance of getting more votes.

A goal should be to have at least one member who will be the campaign contact at every work site. It's preferable to have a contact for every shift, language, and job category. Depending on the size of your local this may be a very modest or very ambitious goal.

Fourth: Make a calendar

Typically, there will be about a month between nominations and the election. But you can't want to wait until nominations to get started. You need to select your candidates and make sure they are eligible before the nomination meeting. And you need to start building your campaign network. The time to build your campaign committee and network is before nominations. In the month between nominations and the election you need to use all your time to campaign. (See the Appendix for a sample campaign calendar)

B. Building your slate

Depending on your local union, there may be several delegates elected or just one. **If there are several positions, it is strongly to your advantage to run as part of a slate rather than as an individual candidate.** Studies show that voters tend to support slates. Also, being part of a slate makes you appear like a stronger and more credible candidate and allows you to build a broader base of support by including candidates from different work sites and backgrounds. A slate is a team of candidates who run on the same platform and encourage members to vote for the other people on the slate.

Some important considerations in creating a slate are:

- 1. Diversity.** Whenever possible, you want your slate to reflect the diversity of membership in your local – the candidates should reflect the race, gender, age, languages spoken, nationality, etc. of the membership
- 2. Unity across craft and division.** It is also important to have candidates from different crafts, companies, workplaces and/or work classifications, depending on the makeup of your local.
- 3. Proven record.** If possible, you want members who can draw votes – not just based on popularity but on their record, what they have stood for in the past.
- 4. Commitment to reform.** Watch out for candidates who want to hop on the bandwagon, even though they have never shown any interest in the issues you are running on, such as reform or democracy. You want people who are reliable and committed to your program, people who will build your credibility, not hurt it.
- 5. Eligibility.** Obviously, your candidates must be eligible to run for delegate. You should be prepared with back-up candidates who are willing to step up and run if one of your candidates is found to be ineligible before or at the nominations meeting.

C. Your platform and campaign issues

A good platform and clear campaign issues are very important. Members will vote for a change if you give them concrete reasons to do so, not just because they trust you or like your name or personality. This is what it means for a successful election campaign to be “issue-driven.”

Keep it real

The trick with delegate elections is taking the general platform of democracy and reform and making it real and important to members in your local. Many delegate candidates have had success with clear, measurable issues like the demand for elimination of multiple salaries for officers, an increase in strike benefit levels, direct election of district and international officers, etc.

Report back

Another issue used by activists in delegate elections in other unions has been the idea that “old guard” candidates go to the convention only to party (on members’ dues) while reform candidates go to participate and work hard for the members. You should make a commitment to the members to report back on what happened and what you did at the convention (See the Appendix for samples of delegate campaign platforms).

Faces and words

The impact of your campaign issues can always be made stronger by including statements and photographs of supportive members in your literature. The members can say in their own words why they think the issues that you are running on are so important.

Get help

It is always smart to get experienced help with literature, from fellow workers, from fellow reform groups in other unions or from the Association for Union Democracy. This may help you produce more effective literature. It will also free up your time for the work of organizing the campaign.

D. Communication strategy

Next, you’ll want to decide how you are going to reach different members with your campaign message. There are several ways to do this. In general, you will want to reach each member with as many of these methods as possible.

- 1. One-on-One Campaigning.** The most important technique. Candidates must take time off work to meet members at the worksite, in the parking lots, at the union hall, and to hold meetings with individuals or groups.
- 2. Leaflets, flyers, postcards, and newsletters.** A good campaign has a plan for reaching every member with campaign literature.
- 3. Mailings.** You have the right to mail literature (at your expense) to the entire membership list, or to target groups within the local. A first class mailing, timed to arrive during the week before the election can be an extremely powerful tool.
- 4. T-Shirts, buttons, hats, etc.** These can carry your message wherever your supporters go and demonstrate your support.
- 5. Phone contact.** Calling workers at home can help you reach workers at a time and place where they may be more willing to talk about issues than at work. Phone banking

your supporters during the days right before the election is also a great way to get people to vote.

- 6. E-mail or web site.** In larger locals or in locals where members are spread out, you can use e-mail or a website to help get the word out and collect contacts. Warning: don't let this distract you from the more important work of member-to-member contact.

E. Fundraising

Fundraising should be part of your plan from the start. You will need some money for campaign literature, phone bills, mailings and other materials. A good fundraising plan will generate the money needed and also get members involved in the campaign.

A good place to start is to ask each slate member to make a significant contribution to the cost of the campaign as part of their agreement to join your team. Be firm about this but also keep an open mind. You may want to encourage lower-paid members to join your slate, and may have to make an exception for them.

Watch out! Fundraising rules vary from union to union. But one general rule is that donations **can not be accepted from employers.** (Who is an employer? Anyone outside the union who employs even one person – for example, your cousin who has a small business, or your friend who has a roofing business with one employee.) **It is also extremely important that you keep good records of where your money comes from,** as this is a common subject of protests after elections.

Fundraising Methods

- 1. Ask.** The best way to raise money. Make a list of key friends and supporters. Figure out ahead of time how much to ask from each one. Call them or speak to them in person. Explain how important the delegate elections are. Get some money in hand and let them pledge more if they don't have it all at the time.
- 2. Collections.** Do collections at workplaces or in meetings. A good method is to have a petition-like form on which members can sign their names and contact information and put the amount donated.
- 3. Event and T-shirt Sales.** You may want to hold barbecues or other social events and charge for admission and also ask for further contributions. You may also want to consider selling t-shirts or hats. These can be effective, but make sure that the cost of the event or of the t-shirts doesn't eat up all of the money that you raise. (Also, watch out for employer contributions in the form of discounted t-shirts, or free meeting space.) If in doubt, stay with simple fundraising methods.
- 4. Raffles.** These can be a good way to involve supporters and raise money. It is also a good way to build your contact list, so make sure that you require raffle buyers to put their name, address and phone number on the ticket. Keep the ticket stubs after the raffle in case of a protest.

Tip: Keep it simple. Elaborate prizes or prizes of interest to only certain members can make for a less successful raffle. Money prizes are a good way to go. Everyone likes the idea of winning money.



4. The Campaign Period

A. Building a list of supporters

To win, a campaign has to reach members. Members have to meet candidates. They have to understand why they should vote for your slate. And they have to actually come down and vote.

Building a list of supporters is the key to winning. This means getting names, phone numbers, e-mail addresses and workplace info from members. This list will serve as your expected list of voters on election day. Here's how to do it:

- Candidates should carry a small memo pad everywhere or take notes on their phone. When they meet members who support the effort, they should get their name, phone number, non-work email, and address if possible. Then, have one person who collects this information make a master list.
- Raffles are an excellent way to develop contact lists.
- Workplace petitions/lists. In workplaces where support is strong, volunteers can circulate support lists on which members can put their phone number. These can later be used for campaign phone banking.

B. Reaching the members

Building the list takes a lot of time and hard work speaking to members.

The key way of reaching members is handing out leaflets at shift-changes, the parking lot, the union hall and other places where you can speak to large numbers of people. This is the bread and butter of campaigning. It seems straight-forward. But the key is to be at the right place at the right time. So, for example, if there are two entrances to a work site, you'll need at least two leafletters to make sure you reach everybody.

It's also important to remember that the number one goal of leafleting at shift-changes is to identify supporters and get them on your list – not just to put leaflets in people's hand. This means taking the time to talk to members, answer questions, and, if they support your campaign, to get their contact information.

C. Keeping organized

Set up an Excel or Google Sheet to keep track of contacts and their information. Having all of your information organized in one place is key to running a winning campaign.



5. Getting Out The Vote (GOTV)

A. The theory of GOTV

The theory of Getting Out the Vote is simple. Not everybody votes in an election. We want to increase turnout by bringing our supporters to vote without bringing out supporters of the other side (We'll leave that job to the other side). This is why it's so important to build a list of supporters. We need to know who our supporters are in order to turn them out to vote.

An illustration:

- If the fifty members who normally attend union meetings vote in the election and 30 vote for the incumbent slate, we will lose 30-20.
- If we increase turnout by bringing 50 new members to vote in the election and half vote for us and half for the incumbents, we will lose 55-45.
- If we increase turnout by bringing 50 new members who we have identified as our strong supporters and 40 of them vote for us, we will win 60-40.

B. Successful GOTV techniques

Here are some tried and true GOTV techniques:

- **Organizing rides or caravans of your supporters to the voting place:** When you bring someone to the election, you know that they will vote. Otherwise, you're hoping that the sitter shows up to watch their kids, that their car starts up in the morning and that they don't forget it's election day. You should plan to have your key activists fill up their cars with supporters and bring them to the polling place. Explain to supporters that coming together demonstrates unity and strength.
- **Phone calls to supporters right before the election:** Why don't more people come to vote in union elections? They are busy, they forget, etc., etc. So, even if you spoke to someone about the election only a week earlier at a shift change, it is important to give them a quick phone call right before the election, preferably the night before, to remind them to vote. This is also the perfect time to pick them up the next day or have them join your caravan of supporters.
- **Highly visible campaigning at workplaces that strongly support your slate:** By the last days of the campaign, you should have a good sense of what work sites most strongly support your slate. Focus campaigning on reminding supporters that the election is coming up and building enthusiasm. Don't campaign at places where the majority supports your opponents, as this will only serve to increase their voter turnout.

C. Mailings

Most winning campaigns do at least one mailing to the membership right before the election. No matter how hard you campaign, it is hard to speak with every member. A mailing may be the only way to reach some members. A well thought out mailing shows that your slate is serious and professional. And, in many cases, the other side will do a mailing too. So, if you don't do one you will be at a big disadvantage. If you do and they don't, all the better.

You have a right to do a mailing to the entire membership or to certain shops through the local union. The union must create a procedure for you to do so. So, if you plan to do a mailing, you should find out in advance from the local union what these procedures are.

Mailings cost money. You should expect to pay around \$1.00 per piece for a mailing. So, if your local has 1,000 members, your mailing will cost at least \$1,000. It is essential that you begin raising money for your mailing early in the campaign so that you don't run short when the time comes to do the mailing.



6. At the Convention and Beyond

So, you win the delegate election in your local. Then what do you do? That's a subject for a whole other manual. But here are a couple of things to think about while you're out on the campaign trail:

A. Caucuses

Work with other delegates who share similar views about democracy and reform in your union so that you can plan your activities at the Convention. This is a great time to share plans, and draft resolutions and amendments to present at convention. Once at convention, get all the pro-democracy delegates together to meet as a caucus. This way, new delegates can get questions answered by delegates who've been through the Convention process before.

B. Reporting-back to members

During and after the convention, it is vital that you report back to members what happened and what you did. Remember, you are running for delegate in order to represent your co-workers. Many rank and file delegates have found it useful to put together a short written report to distribute to members on social media or after they return home. Take pictures, gather testimony from other delegates on their experiences or take videos that you can share with other members.

Appendices

A1: Eligibility requirements to run for delegate

Eligibility Requirements

- Every union has different eligibility requirements, so it is imperative to learn them far in advance to make sure you qualify. Often, unions have rules that require you to be in “good standing” to become a delegate.

Note that local union by-laws sometimes include ineligibility requirements that are not allowed under federal law. If you have any questions about whether your local’s eligibility requirements are legal, contact AUD.

A2: Fundraising rules

Under federal law, there are certain restrictions on fundraising. You should be aware of them and follow them closely. You should also keep your eyes out for violations of the rules by the other side.

Prohibited contributions. No contributions of money (or anything of value) can be accepted from employers – even if the person employs only one worker, for example a lawyer who has a secretary. No contributions can be accepted from any labor union. Union resources, including fax machines, letterhead, phones, etc. can not be used to campaign for any candidate, unless all candidates are provided equal access to the same resources. NOTE: the local or District may have other election rules that ban other types of contributions.

***TIP:** All of your literature should state donation rules. Failure to do this is only asking for trouble. It could lead to election protests being filed against your slate. Contact AUD for the exact wording to use.*

- **Recordkeeping.** You will want to keep track of money collected including the names of donors. You will also want to keep track of any campaign expenditure over \$50. You do not have to file reports but must have good documentation in hand.
- **Limits.** Check if local election rules limit the amount that can be raised from an individual.

A3: Sample campaign calendar

Place the following information on a calendar:

3/15 Meet with potential slate members and key supporters. Set goals for next month of recruiting other slate members, checking eligibility, fundraising, outreach to work sites with no campaign contacts, outreach to existing network of campaign contacts.

4/12 Kick-off meeting with slate and all campaign coordinators.

4/18 Brief meeting with slate, nominators and seconders to go over plan for nominations meeting.

4/19 Nominations meeting

Between nominations and election: Weekly campaign schedule at work sites.

5/9 Mailing dropped at post office.

5/14-5/16 Campaign at strongest work sites.

5/15-5/16 Phone bank supporters.

5/17 Election

A4: Sample Convention Delegate Platform

(Note: this is a sample, you should write up your own platform based on your goals and the members' top issues.)

If we are elected delegate, we pledge to fight for these goals:

One Member, One Vote. We will fight for direct elections of all international officers. We will move to amend the constitution to guarantee this right. We will fight to give you, the working members of our union, a vote and a voice.

We Will Fight for a Rank and File Bill of Rights.

We support a Bill of Rights for _____ members, including the right to see in writing all contract changes before voting on them, the right to have members elected to all bargaining committees, the right of each local union to decide if the members want elected business agents, the right to elect stewards, the right of all members to participate in our union.

We Will Protect Your Dues Money!

We will vote to ban multiple salaries to officials and cap any union official salary at a maximum of \$XXX. We will save \$XXX in dues money to be directed to organizing and working for better contracts for _____ members.

We Will Be Working Delegates!

We will be at the convention to work for you, and we will report back to you, in writing, on what we voted on and accomplished.

We Will Fight for ALL _____ Workers!

Real unions are about solidarity and equality – not self-interest and favoritism. We need unity to win and enforce strong contracts. We will support resolutions and candidates who represent all union members, not just the chosen few.

A5: The Right to Participate in Union Delegate Elections

This summary describes your rights under federal laws: the National Labor Relations Act (NLRA) and the Labor Management Reporting and Disclosure Act (LMRDA). Your contract and union constitution and bylaws also have important information that you should consult. For more information see www.uniondemocracy.org.

You have the right as a member of the union to participate in union elections. You have the right:

- To run for office, provided you meet reasonable requirements the union sets (such as good standing), and nominate others to run.
- To vote by secret ballot in local union officer elections, including delegate elections where the delegates will elect the officers of intermediate or international bodies (except where officers serve as delegates under the union constitution);
- To see a copy of union election rules and procedures,
- To organize a committee, caucus, or slate of candidates,
- To attend meetings of informal committees, caucuses, slates or any other group without official union permission or participation,
- To criticize union policies, officers, staff, and/or other candidates,
- To express your views and promote your campaign via any and every form of speech, including newsletters, buttons, e-mail, and websites,
- To campaign on the job – on non-work time in a non-work place,
- To send uncensored campaign mailings, at your expense, to the union membership or any portion of the membership,
- To equal access to union publications in election campaigns.

Candidates for office have the right:

- To inspect the local's membership list and list of eligible voters,
- To observe all phases of the balloting process, including the preparation of ballots before the election, and the collection, transportation, and counting of ballots.

Other Rights on the Job and in the Union

You have the right to:

- Essential information: complete copies of the union constitution and bylaws; complete copies of union contracts (including any side agreements) that affect your job; and copies of annual union financial reports, including the LM-2 forms,
- Attend and participate in union meetings,
- Freedom from improper discipline (retaliation for example),
- Due process during any union disciplinary proceeding,
- Union representation if you are called in to a hearing with management that you feel may lead to discipline.
- Discuss union policies and issues with co-workers and supporters,
- Take collective action to influence the union (pickets, buttons, etc.)*,

- Discuss working conditions and union issues with your coworkers,*
- Complain to management about working conditions,*
- Hand out leaflets, hold meetings, rallies, and marches, wear T-shirts, armband, or buttons, and take other action on the job,*
- Freedom from employer surveillance of union activity.
(* The employer can adopt policies to protect its legitimate business interests. For example, you should do your collective action on non-work time (before work, on a break) in a non-work place (lunch room, parking lot, etc.) and make sure you do not interfere with your work performance, or that of your fellow employees; and you cannot substitute a T-shirt for your uniform where you have contact with the public.)

NOTE

- It is illegal for the union or the employer to retaliate against you, or threaten you, for exercising your legal rights.
- You can be disciplined by the union if you advocate leaving the union, or changing unions.
- Be careful not to represent yourselves or your group as official union representatives if you are not.
- Always check the contract for rules on picketing, wearing buttons, and other actions.



Enforcing your rights

You can enforce many of these rights on your own. However, you may need to consult, or to retain, a lawyer to help enforce some rights. Most election rights are enforced by filing a complaint with the US Department of Labor or a lawsuit in federal or state court.

In most situations, you will be required to “exhaust internal union procedures” before taking your case to the Department of Labor (DOL) or to court. This means you must file an internal union protest following the procedures described in your local union bylaws and the ILA constitution, even if you believe that this is a waste of time. If after four months (three months for election complaints) your internal protest or appeal has not been resolved at all, or in a satisfactory manner, you may then go to the DOL or court. If you fail to exhaust the union’s internal procedures, the union cannot discipline you, but the court or DOL may dismiss your complaint.

Because legal procedures are often complex, and have strict time limits, it is important to get advice. To get reliable legal advice, you should consult a lawyer. For potential referrals contact AUD.

Filing a formal legal complaint is not always the best way to get what you want. You should carefully weigh your situation and decide whether a legal proceeding is the right tool for the job. Lawsuits are slow, time consuming, and often expensive.

The best way to protect and enforce your rights is usually to organize with other members to put direct pressure on the boss or the union – through petitions, job actions, campaigns at union meetings, newsletters – and to win the support of outside groups. In the final analysis, the best solution for problems in the union is for the members to organize and change the union, including, but not limited to, running for union office. You are the ones who can solve the problem.