

The Power of Good Note-taking

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ou don't have to be a cook to know how critical it is that a recipe list all the ingredients, make clear how much of each you need, and detail the temperature you need to set the oven.

Without these instructions

you're likely to end up with an undigestible mess on your hands.

So it is with taking notes. Your notes are your ingredients for the completion of any number of steward tasks, and if you can't make sense of your notes, or they're incomplete, you're sure to give yourself indigestion—if not worse.

The notes you take are an essential way to capture key points of a conversation with a member or to begin

investigating a potential contract violation. Stewards' notes can function as "to do" lists noting what follow-up is required or can keep you on track for a grievance presentation with management. Good note-taking helps a steward to be more organized. But should you scribble down everything that's said? How many notes are too many notes? Are there best ways to take quality notes?

Why Take Notes at All?

Notes should be taken for two reasons:

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If you will be following up to get more details for a grievance investigation, notes can keep you on track. What do you need to do next? With whom do you need to speak? With this type of note keeping there is no need for formality—keep them short and to the point, just a simple road map of where the investigation is leading is fine. Once the matter is settled, there is

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- What occurred?
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- Who was witness to the event?

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How Many Notes Are Too Many?

Many stewards start meetings with members by grabbing a pen and pad of paper and scribbling notes with pen blazing. Instead, imagine what could happen by focusing on listening to what the member has to say, then capturing the most important points in note form. The result will likely be greater attention paid to the issue at hand, and the opportunity to build a greater steward-member relationship. You'll have been more attentive to the member's concerns and be better able to figure out what the real issues are, rather than wasting time and paper on keeping a record of mostly useless conversation.

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Imagine you are a member asking a steward for help for the first time. As you are explaining your concern to the steward, you notice that she isn't looking at you at all, but is simply focused on writing down what you say. How might that make you feel? Might you begin to be self-conscious about your words? Might you wonder if she is really hearing what you're saying? Would you feel like you were connecting with the union rep? Failure to make eye contact with the member can send the unintended message, "You are not important, I'm only interested in your words." As steward you can build trust and rapport if you:

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By following these simple tips you will better communicate your interest in the member while getting the notes you'll need in order to help.

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Good note-taking starts with good listening, by focusing on what is being said, who is saying it, tone of voice and nonverbal messaging. A union representative may miss many of these if his or her head remains buried in a notepad. Asking relevant, probing questions will help clarify the who, what, when, where, how, and why of the issues.

Using these skills will help you build trust with the speaker, be it a line supervisor or a disgruntled member. It puts you and them at ease. It also helps you to separate key points in the conversation from general information, allowing your notes to reflect the key issues you need to follow up on.

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—Patrick Domaratz. The writer is a veteran labor educator.

Dealing with On-the-Job **Disability Issues**

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So, more than almost any other issue, disability is something the union should plan ahead for. Disability should be a topic of general discussion, a focus for steward trainings, and an issue negotiated at the bargaining table. The attitude of the union should be: "This could

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The overarching law in the United States is the 1990 Americans with Disabilities Act, or ADA. Some states have their own version of the ADA. The core of the ADA is that if workers can perform the essential functions of the job, with or without reasonable accommodation, they have a right to be protected against discrimination. "Reasonable accommodation" is defined as that accommodation which allows a worker to perform essential functions of the job without undue hardship for the employer.

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Act of 1973 (which applies to workplaces receiving federal money), a workers' comp issue, or a discrimination complaint filed with the Equal Employment Opportunity Commission (EEOC). What procedure takes precedence over others is currently a matter of active litigation.

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In Canada, although pressure has been building to create a law comparable to

> the ADA, there is currently only the Employment Equity Act (EEA) of 1986, revised in 1995, which covers federally regulated workplaces. There are also no separate provincial laws. Most employers are therefore exempt. This is all the more reason for Canadian unions to be proactive in bargaining over disability.

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Bargaining on Disability Issues

Many unions in the United States are fearful of invoking the ADA. They fear the law will take precedence over the existing collective bargaining agreement. They see disability as a divisive issue within the workforce because some workers may say putting a disabled worker back on the job will put other workers at risk. However, many contracts incorporate the ADA and other laws by reference, or else include disability in the nondiscrimination article.

Having disability in the contract is good politically because it makes clear to everyone that disability is a union issue, not just a matter of law and lawyers. It also opens up the possibility of enforcement through the grievance procedure, which in many cases is much more responsive to workers than either EEOC complaints or civil suits.

Disability issues can also be addressed in the contract by negotiating clear job descriptions that carefully name the essential functions of the job. This can result in better, safer work for everyone. The overall effect will be raising labor standards for everyone, as opposed to firing the disabled person and driving labor standards down. Also, there will be less ambiguity when a worker asks for reasonable accommodation so he or she can do those essential functions.

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When the disabled worker contacts the union, the steward can help write the request for accommodation. If there is a grievance such as discrimination, you can use the tests of just cause, especially looking for evidence of unequal treatment. Make it clear how this is a union issue, not just one worker's problem.

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Disability issues overlap with health and safety issues. A workplace can be safe, but over the years, workers can become disabled simply through the way production is organized—a too fast or poorly designed assembly system, for example. What workers know about their work brings an essential perspective on how a job can be re-organized. Unions have been won over to dealing with health and safety issues, but are not yet easy with disability issues. The union can initiate this discussion—not as something to be afraid of, but as something to which everyone can contribute.

—Helena Worthen and Joe Berry. The writers are veteran labor

10 Rookie Mistakes

id everything go absolutely perfectly the first time you ever drove a car? Unlikely. How about your very first day on your very first job: probably not flaw-free. Or how about your very first date? Every move you made, every word out of your mouth was nothing but cool and sophisticated, right?

Probably not. Very few things in life go perfectly the first time around. Rookies make rookie mistakes. It's the rare person who can try something new for the first time and be perfect at it, and that holds true for new union stewards. Just like your first date or your first time driving a car, you're determined to be "perfect" but the odds are against you.

Still, as for a rookie driver, there are some basic rules of the road for the new steward who wants to do whatever possible to avoid costly mistakes. In no particular order, here are a dozen rookie mistakes to avoid.

Don't Be Afraid. It's natural to be concerned that you won't do the job right: There's a lot to learn and you may not yet be comfortable being in a position where you deal with management from a position of authority. Keep in mind that millions of other stewards have gone through the same thing, and no one expects you to be Supersteward. If you approach it honestly and consult with other stewards and union officers when you're not sure how to handle something, you'll do just fine.

Don't Be Shy About It. You don't want to get on a bullhorn and brag about your new role as steward, but you don't want to keep mum about it either. You can't be an effective steward unless the co-workers you serve, and the management people you'll have to deal with on a day-to-day basis, know who and what you are and how to find you if they need you.

Don't Shoot from the Hip. Just because you're a steward doesn't mean you know everything. If a question comes

up that you can't answer, don't try: Say you'll find the answer and get back to the person. There's no such thing as a steward smart pill. It will take you a while to get familiar with the union contract and with the labor laws that affect your workplace. All it takes on a steward's part is to give a few wrong answers before everyone avoids him or her altogether and seeks out a more knowledgeable union official.

Don't Play Favorites. It can be a big temptation to focus your energies on your friends and immediate co-workers. Big mistake. Just one reason it's a big mistake is that, by law, the union—and that includes the steward—must provide equal representation to every worker. It makes no difference whether you like the worker or hate him; whether she's the strongest union member around or the biggest union-hater; whether he's your ex-spouse or your current lover. You have to let all the workers you're responsible for know that you're there for them.

Don't Ignore the New Hires. It's a steward's job to greet every new worker who comes on the job, to welcome the worker and explain the steward's role. Just because you made the rounds when you became steward and made sure everyone knew about it doesn't mean that the person who starts work today knows you.

Don't Let Management Run over You. Some supervisors or managers get a thrill out of trying to make a new steward feel uncomfortable, unknowledgeable, and unwelcome. You don't have to take it. By law—by law—the steward is the *equal* of management when conducting union business. Remember, if you're not sure of how to handle a problem, call in a veteran steward or seek help from a union officer, but don't allow management to treat you poorly.

Don't Confuse Your Union Role with Your Employee Role. While

as a steward you are equal with management when doing union business, when you're not conducting union business you have to follow the same rules and requirements that apply to everyone else. Just because you're the steward doesn't mean you can wander off and take a nap.

Don't Think You Should Do It All Yourself. Depending on the workplace, rookie stewards can feel overwhelmed by their responsibilities. An important thing to remember is that the most effective stewards are those who get their co-workers involved in the union's work. Your job isn't to make everyone's life better, your job is to work with your co-workers toward that goal. You might even think of yourself as an organizer more than a steward, because you should organize the people around you to help move the union forward.

Don't Forget to Have a System. Every steward needs to have some kind of system to keep track of paperwork: Throwing stuff into a car trunk or work locker might be good for a few days or weeks, but you'll soon find that you need a filing system of some sort to keep track of everything. Talk to other stewards about how they do it. It will make your life a lot easier.

Don't Beat Yourself Up. As a rookie you're likely to mess up on occasion. Every rookie does. Just do the best you can, and seek out help from the union when you think you're in over your head. If you make a mistake, deal with it as soon as you can before it gets worse and then look ahead. Remember that you're doing an important job for your co-workers, one that a lot of people probably don't have the guts, energy and dedication to take on. Don't get mad at yourself, be proud of yourself for caring enough to accept the responsibility.

—David Prosten. The writer is co-editor of Steward Update and founder of Union Communication Services (UCS).

"Troublemakers"

ne of a steward's most important jobs is to sign up new members, or just get uninvolved members more enthused about and active in the union in general. It's during this process that the following refrain is most likely to be heard:

"Why is it that the union only seems to look out for the members who are troublemakers?"

It's a good question, for many reasons. How would you respond to it?

Here are some suggestions from veteran union activists:

- Explain that all of the terms and conditions of the contract—wages, benefits, language—apply to all members all the time, not just when an individual member has a "case." If you have a history of the union that shows the various improvements won in each negotiation, show it to the critic. Another good tool is a comparison sheet contrasting your wages with non-union wages in your industry, or in your geographic area.
- Every *member*, not just the trouble-maker, is protected by the contract. Forget about the troublemaker this week, you can say, and think about next week, when *you* might want to bid on a job, use seniority preference for a shift change, or avoid a health hazard. The union is there with *you*.
- Every *member*, not just the troublemaker, will benefit from future improvements negotiated by the union, on everything from wages to insurance to health and safety improvements and holidays.
- Every *member* is helped by the political action of the labor movement. Remember that unions are the largest single organized group of people in the country, and as such have a lot of power. A huge number of our most basic laws—including workers comp, Social Security, OSHA, civil rights, even minimum wage and overtime—exist because unions led the fight for *all* workers, union or not.
- Every time the union organizes a new worker, *everyone* in the union is made stronger—not just the troublemakers.

More organized, decently-treated workers make it harder for employers to resist union demands in negotiations.

- There are a lot of "do good" activities that the union supports for the benefit of everyone. Unions routinely get behind charitable causes and fund raisers to assist their communities. They constantly help out in local emergencies. These activities and others make our communities a better place to live, just as the union makes the workplace a better place to work for everyone—not just the "troublemaker."
- Remember that, right or wrong, *you* may be considered a "troublemaker" some day and need protection and representation.

 Usually this charge is made by bosses—and you know how unfair and unreliable they can be.
- Working under a union contract with its job security protection is like carrying fire insurance on your house—you hope you never need it but you're glad to have it. And you'd be in big trouble if it wasn't there when you *did* need it.
- Without the union, you wouldn't even be *having* this discussion: No one would

be protected and you all would be at the tender mercy of your employer.

■ And, yes, the union does protect "troublemakers." The union guarantees that they, like everyone else, can only be disciplined for just cause and that they get counseling or outside help or whatever is needed to keep them on the job.

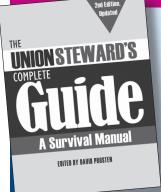
When responding to the charge that "the union's just for troublemakers," it's helpful to make your answers as specific as possible and to focus the complainer on your particular workplace. You can also expound on a grander view of unionism: that it gives every worker a voice, so you can stand up to the employer without complete fear of retaliation.

You can also describe the positive mental process that arises from challenging management decisions, rather than simply obeying.

And finally, as one UAW veteran remarked: "A chain is only as strong as its weakest link. You protect one, you protect all."

—Bill Barry. The writer recently retired as director of labor studies at Dundalk (Md.) Community College.

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OFFICE OF THE INTERNATIONAL PRESIDENT

Dear IAM Shop Steward,

Although November seems like a long way away, it's not too early to get ready for the important midterm elections in the United States. All 435 seats in the U.S. House of Representatives and 33 of the 100 seats in the U.S. Senate are up for election. That's along with contests for 38 state and territorial governor's seats and 46 state legislatures (except Louisiana, Mississippi, New Jersey and Virginia), four territorial legis-

The big question in this election is who will control the U.S. Senate. Right now, Democrats hold a slim latures and numerous state and local races. majority. There are 53 Democratic, 45 Republican and two Independent senators (both of whom caucus with the Democrats). Among the 33 seats up for election, 21 are held by Democrats and 15 by Republicans.

The Republican party and their related outside support groups like the Koch brothers are gearing up to wrest control of the Senate. If they succeed, the results could be devastating. Just imagine the rabidly anti-union laws that have passed in states like Wisconsin, Michigan, Indiana or Ohio becoming federal laws

When Wisconsin voters elected Republican Governor Scott Walker and a Republican majority in their legislature, the anti-labor majority wasted no time using dirty tricks to pass the worst anti-union law, Act 10, that apply to everyone.

It mandated annual certification elections that require unions to win a majority of eligible workers, not in the state's history. It was a right-to-work for less law on steroids. just a majority of those actually voting, to retain certification. It outlawed dues checkoff and restricted most unions to negotiate for just wages, and any increase couldn't be higher than inflation. Cash-strapped school districts could freeze teacher pay and force higher pension and healthcare contributions.

Republican majorities in traditional labor-friendly states like Michigan and Indiana passed right-towork for less laws. Republicans in Ohio passed a law restricting collective bargaining rights for public work-

And in all these states, anti-labor laws decimate union membership and mean families have a lower ers — but, wisely, voters rejected it in a referendum.

The stakes are big, so it's not too early to start voter registration drives in your shops. Educate yourselves on the best pro-labor candidates and then spread the word about them to co-workers, because the quality of life. opposition is dead serious about eliminating labor as a strong voice for working families.

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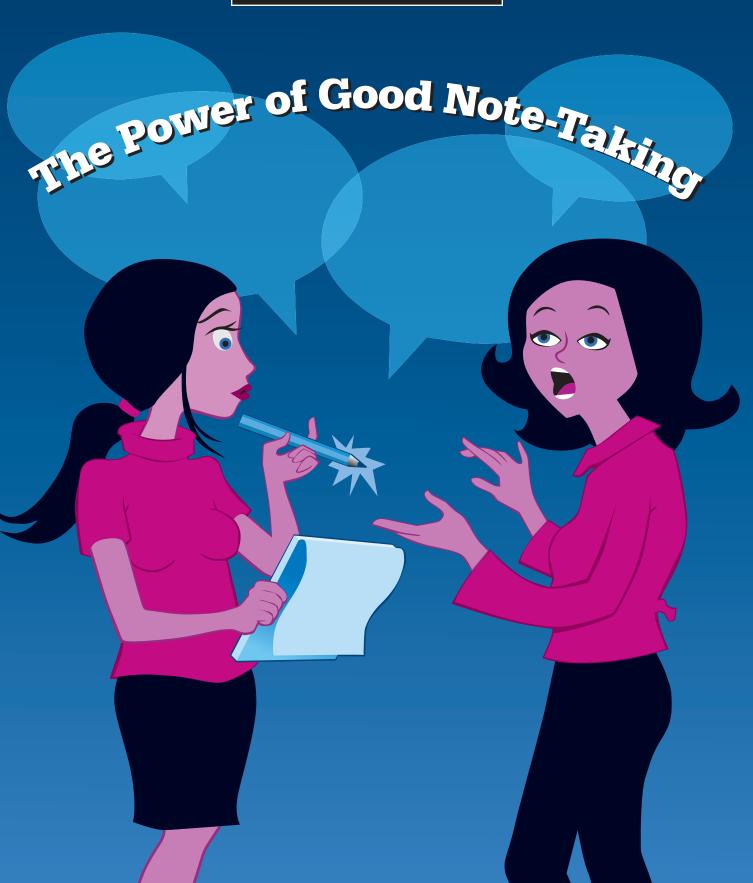
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When the disabled worker contacts the union, the steward can help write the request for accommodation. If there is a grievance such as discrimination, you can use the tests of just cause, especially looking for evidence of unequal treatment. Make it clear how this is a union issue, not just one worker's problem.

Stewards will have to help the member work out the relationship between a request for accommodation and/or a possible workers' comp claim. In using the law you want to demonstrate that your member can do the essential functions of the job if given reasonable accommodation, but under the workers' comp system the incentive is to maximize the severity of your member's disability so as to get the maximum compensation. This is not an easy contradiction to manage. The union, together with the union's workers' compensation attorney, needs to deal with this in training and in working with individual claims.

Disability issues overlap with health and safety issues. A workplace can be safe, but over the years, workers can become disabled simply through the way production is organized—a too fast or poorly designed assembly system, for example. What workers know about their work brings an essential perspective on how a job can be re-organized. Unions have been won over to dealing with health and safety issues, but are not yet easy with disability issues. The union can initiate this discussion-not as something to be afraid of, but as something to which everyone can contribute.

—Helena Worthen and Joe Berry. The writers are veteran

10 Rookie Mistakes

id everything go absolutely perfectly the first time you ever drove a car? Unlikely. How about your very first day on your very first job: probably not flaw-free. Or how about your very first date? Every move you made, every word out of your mouth was nothing but cool and sophisticated, right?

Probably not. Very few things in life go perfectly the first time around. Rookies make rookie mistakes. It's the rare person who can try something new for the first time and be perfect at it, and that holds true for new union stewards. Just like your first date or your first time driving a car, you're determined to be "perfect" but the odds are against you.

Still, as for a rookie driver, there are some basic rules of the road for the new steward who wants to do whatever possible to avoid costly mistakes. In no particular order, here are a dozen rookie mistakes to avoid.

Don't Be Afraid. It's natural to be concerned that you won't do the job right: There's a lot to learn and you may not yet be comfortable being in a position where you deal with management from a position of authority. Keep in mind that millions of other stewards have gone through the same thing, and no one expects you to be Super-steward. If you approach it honestly and consult with other stewards and union officers when you're not sure how to handle something, you'll do just fine.

Don't Be Shy About It. You don't want to get on a bullhorn and brag about your new role as steward, but you don't want to keep mum about it either. You can't be an effective steward unless the co-workers you serve, and the management people you'll have to deal with on a day-to-day basis, know who and what you are and how to find you if they need you.

Don't Shoot from the Hip. Just because you're a steward doesn't mean you know everything. If a question comes

up that you can't answer, don't try: Say you'll find the answer and get back to the person. There's no such thing as a steward smart pill. It will take you a while to get familiar with the union contract and with the labour laws that affect your workplace. All it takes on a steward's part is to give a few wrong answers before everyone avoids him or her altogether and seeks out a more knowledgeable union official.

Don't Play Favourites'. It can be a big temptation to focus your energies on your friends and immediate co-workers. Big mistake. Just one reason it's a big mistake is that, by law, the union—and that includes the steward—must provide equal representation to every worker. It makes no difference whether you like the worker or hate him; whether she's the strongest union member around or the biggest union-hater; whether he's your ex-spouse or your current lover. You have to let all the workers you're responsible for know that you're there for them.

Don't Ignore the New Hires. It's a steward's job to greet every new worker who comes on the job, to welcome the worker and explain the steward's role. Just because you made the rounds when you became steward and made sure everyone knew about it doesn't mean that the person who starts work today knows you.

Don't Let Management Run over You. Some supervisors or managers get a thrill out of trying to make a new steward feel uncomfortable, unknowledgeable, and unwelcome. You don't have to take it. By law—by law—the steward is the *equal* of management when conducting union business. Remember, if you're not sure of how to handle a problem, call in a veteran steward or seek help from a union officer, but don't allow management to treat you poorly.

Don't Confuse Your Union Role with Your Employee Role. While

as a steward you are equal with management when doing union business, when you're not conducting union business you have to follow the same rules and requirements that apply to everyone else. Just because you're the steward doesn't mean you can wander off and take a nap.

Don't Think You Should Do It
All Yourself. Depending on the
workplace, rookie stewards can feel overwhelmed by their responsibilities. An
important thing to remember is that the
most effective stewards are those who get
their co-workers involved in the union's
work. Your job isn't to make everyone's
life better; your job is to work with your
co-workers toward that goal. You might
even think of yourself as an organizer
more than a steward, because you should
organize the people around you to help
move the union forward.

Don't Forget to Have a System. Every steward needs to have some kind of system to keep track of paperwork: Throwing stuff into a car trunk or work locker might be good for a few days or weeks, but you'll soon find that you need a filing system of some sort to keep track of everything. Talk to other stewards about how they do it. It will make your life a lot easier.

Don't Beat Yourself Up. As a rookie you're likely to mess up on occasion. Every rookie does. Just do the best you can, and seek out help from the union when you think you're in over your head. If you make a mistake, deal with it as soon as you can before it gets worse and then look ahead. Remember that you're doing an important job for your co-workers, one that a lot of people probably don't have the guts, energy and dedication to take on. Don't get mad at yourself; be proud of yourself for caring enough to accept the responsibility.

—David Prosten. The writer is co-editor of Steward Update and founder of Union Communication Services (UCS).

"Troublemakers"

ne of a steward's most important jobs is to introduce new members to the union, or just get uninvolved members more enthused about and active in the union in general. It's during this process that the following refrain is most likely to be heard:

"Why is it that the union only seems to look out for the members who are troublemakers?"

It's a good question, for many reasons. How would you respond to it?

Here are some suggestions from veteran union activists:

- Explain that all of the terms and conditions of the contract—wages, benefits, language—apply to all members all the time, not just when an individual member has a "case." If you have a history of the union that shows the various improvements won in each negotiation, show it to the critic. Another good tool is a comparison sheet contrasting your wages with non-union wages in your industry, or in your geographic area.
- Every *member*, not just the trouble-maker, is protected by the union contract. Forget about the troublemaker this week, you can say, and think about next week, when you might want to bid on a job, use seniority preference for a shift change, or avoid a health hazard. The union is there with you.
- Every *member*, not just the trouble-maker, will benefit from future improvements negotiated by the union, on everything from wages to insurance to health and safety improvements and holidays.
- Every *member* is helped by the political action of the labour movement. Remember that unions are the largest single organized group of people in the country, and as such have a lot of power. A huge number of our most basic laws—including workers comp, Social Security, health and safety, civil rights, even minimum wage and overtime—exist because unions led the fight for all workers, union or not.
- Every time the union organizes a new worker, *everyone* in the union is made

stronger—not just the troublemakers. More organized, decently-treated workers make it harder for employers to resist union demands in negotiations.

- There are a lot of "do-good" activities that the union supports for the benefit of everyone. Unions routinely get behind charitable causes and fund raisers to assist their communities. They constantly help out in local emergencies. These activities and others make our communities a better place to live, just as the union makes the workplace a better place to work for everyone—not just the "troublemaker."
- Remember that, right or wrong, you may be considered a "troublemaker" some day and need protection and representation. Usually this charge is made by bosses—and you know how unfair and unreliable they can be.
- Working under a union contract with its job security protection is like carrying fire insurance on your house—you hope you never need it but you're glad to have it. And you'd be in big trouble if it wasn't there when you *did* need it.
- Without the union, you wouldn't even be *having* this discussion: No one would

be protected and you all would be at the tender mercy of your employer.

■ And, yes, the union does protect "troublemakers." The union guarantees that they, like everyone else, can only be disciplined for *just cause* and that they get counselling or outside help or whatever is needed to keep them on the job.

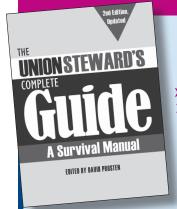
When responding to the charge that "the union's just for troublemakers," it's helpful to make your answers as specific as possible and to focus the complainer on your particular workplace. You can also expound on a grander view of unionism: that it gives every worker a voice, so you can stand up to the employer without complete fear of retaliation.

You can also describe the positive mental process that arises from challenging management decisions, rather than simply obeying.

And finally, as one IAM veteran remarked: "A chain is only as strong as its weakest link. You protect one, you protect all."

—Bill Barry. The writer recently retired as director of labor studies at Dundalk (Md.) Community College.

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OFFICE OF THE INTERNATIONAL PRESIDENT

Dear IAM Shop Steward,

As an IAM Shop Steward, you are much more than just an authoritative voice on matters of contract interpretation or the first person fellow workers turn to in times of trouble.

On any given day, a shop steward can be part lawyer and part priest; part soldier and part social worker. There is no other position in our union quite like it. Only those who have held the job know how reward-

With a strong support network of fellow stewards, local committee members and local lodge officers, a ing, fulfilling and at times thankless it can be.

"When the Union's inspiration through the workers' blood shall run, there shall be no power greater steward's job can be more manageable. anywhere beneath the sun; yet what force on earth is weaker than the feeble strength of one, but the Union makes us strong." The opening verse to Solidarity Forever reminds us that collective action is foundation of our power.

Solidarity is the key to overcoming the challenges we face. IAM members keep North America moving and I feel that one specific verse of Solidarity Forever was written specifically for the Machinists: "They have taken untold millions that they never toiled to earn, but without our brain and muscle not a single wheel can turn. We can break their haughty power, gain our freedom when we learn, that the Union makes

Solidarity begins with you, the steward. Contract administration, grievance handling, effective communication skills and a steward's legal rights are just some of the topics that will be examined in issues of IAM us strong." Educator. Along with political action, you will be counted on to talk to your members.

Educate yourselves on the best pro-labour candidates for the upcoming federal and provincial elections, and then spread the word about them to co-workers, because the opposition is dead serious about

On behalf of the IAM Executive Council and IAM members everywhere, please accept our thanks for eliminating labour as a strong voice for working families. the extraordinary job you do every day.

In Solidarity,

R. Blomas Buffenbarger

R. Thomas Buffenbarger International President







