Strategic Planning and Organizing
SWOT Analysis
National Labor College, Organizing I
It trickles down? Income for the wealthy soars while wages stagnate despite productivity gains.

Percentage Growth Since 1982, Inflation Adjusted

CEOs use their multinational corporations to create jobs...overseas.

...while they cut 1.1 million American jobs.

2.9 million jobs created overseas in the past decade...

Sources: Change in employment levels calculated based on data from U.S. Multinational Companies: Operations of U.S. Parents and Their Foreign Affiliates in 2010, U.S. Bureau of Economic Analysis (BEA), November 2012 (Table 1) and U.S. Multinational Companies: Operations in 2006, BEA, November 2008 (Table 1).
“You must be the change you wish to see in the world.”
- Mohatma Gandhi

“...There is no path. We make the path by walking.”
- Antonio Machado
Union Membership, 1948-2012

Strategic Organizing

No longer playing by the rules that were designed for us to lose.

Involving the union’s #1 resource: our members.

We cease organizing in isolation from each other.

We make organizing a community process.

We start organizing like a movement again.
Strategic Corporate Research

A way for unions...

To understand key employers & industries

To plan comprehensive campaigns involving strategic research, community outreach, and worker mobilization

To use creative tactics

To build power (density) for workers
Strategic Corporate Research

We want to look at a corporation from the boss’s perspective – what are the employer’s strategic relationships that allow the business to exist and profit?

Once identified, we work to affect those strategic relationships to change how the boss deals with workers.
Returning to the basics
Why is all of this necessary?
The implementation of strategic organizing means:

Building power rather than just numbers of members

Having an industry vision

Picking your targets instead of your targets picking you

Utilizing the union treasury wisely and committing sufficient resources to win

Involving the union’s #1 resource: its members.
3 key steps for strategic planning

1. Envision the desired “future state” of your organization
2. Assess the “current state” of your organization
3. Design a strategy to move from the current state to the future state
Uses of SWOT Analysis

Makes sense of complicated situations

Ensures that any strategic planning is based on your real situation, not just opinion and assumptions

Big projects or Small projects
SWOT Analysis
SWOT Analysis

S - Strengths
O - Opportunities
W - Weaknesses
T - Threats
SOOT: Strengths, Weaknesses, Opportunities, Threats

GOAL
What are our strengths?

What are our weaknesses?

GOAL

Internal assessment of the organization
GOAL

What are our opportunities?

What are our strengths?

What are our weaknesses?

What are our threats?

Internal assessment of the organization

External assessment of the environment
SWOT Analysis

Helpful to achieving goal

Strengths

Opportunities

Harmful to achieving goal

Weaknesses

Threats
EXAMPLE ANALYSIS:

**Internal assessment of the organization**

**What are our strengths?**
- Knowledge of industry
- Financial resources
- Motivated staff
- Tenacity
- Strong contracts to leverage

**What are our weaknesses?**
- Decentralized union structure
- Overlapping locals
- Lack of member support for organizing
- Shortage of organizers
- No overall strategy

**What are our opportunities?**
- Political support in a few key markets
- Mergers between union and non-union companies = card check opportunities
- Increasingly immigrant sector workforce more favorable to unions

**What are our threats?**
- Anti-union climate
- Recession
- Competing unions
- Globalization/jobs moving overseas

**External assessment of the environment**
A Strategic Plan is like a Roadmap

Identify short-term objectives
Doable and manageable
Aligned with other organizational goals
Measurements for assessment
Key factors to consider in your plan

Goals
Organizational considerations
Constituents, allies and opponents
Targets
Tactics
Timeframes
What are our Opportunities?

What are our Strengths?

What are our Weaknesses?

What are our Threats?

Internal assessment of the organization

External assessment of the environment

ORGANIZING