

# Report and Recommendations

January 8, 2024



# Introduction

The delegates at the IAM's 40th Convention overwhelmingly approved Resolution 1, creating the Committee on the Future of the Union (COTF). Resolution 1 called for the formation of the COTF and charged it with holding listening sessions throughout the United States and Canada, seeking members' input on a wide-ranging number of issues and questions facing our union at a pivotal time.

The formation of the COTF was, in part, an extension of a rich tradition in our union of seeking direct member input on how our union can evolve and adapt to grow and prosper for the benefit of current and future members. In 1995, 1998 and 2002, the IAM Blue Ribbon Commissions held townhall meetings throughout North America seeking feedback and direction from the membership. The work of the Blue Ribbon Commissions helped to shape the union that we are today. The COTF was charged with seeking input from members and making recommendations about the union we will be in the future.

The COTF consists of a Grand Lodge staff member, a district lodge staff member, and a rank-and-file local lodge member each from Canada, the U.S. territories, including Air Transportation, and the Rail Division. The members appointed to serve on the Committee on the Future are listed below:

- Amanda Andrew, Eastern Territory
- Chuck Bennett, Southern Territory
- Tiwaan Bradley, Eastern Territory
- Brandon Bryant, Western Territory
- Ashley Carpenter, Southern Territory
- Vincent Constantineau, Canada
- David DiMaria, Eastern Territory
- Reggie Dixon, Southern Territory
- Juan Estrada, Rail Division
- Mary Farley, Midwest Territory
- Walter Gerlach, Canada
- Natalie Gonzalez, Western Territory<sup>1</sup>
- Jason Hardwick, Western Territory
- Alex Hoekstra, Midwest Territory
- Scott Jackson, Canada
- Jason McAdoo, Air Transportation Territory
- Allison Parker, Rail Division
- Jerry Redman, Rail Division
- Larry Reeves, Air Transportation Territory
- Kaleb Rosa, Air Transportation Territory
- Geny Ulloa, Midwest Territory

In February 2023, the COTF members met at the Winpisinger Center to organize a plan to carry out the mission set by Resolution 1. Because Resolution 1 raised so many questions and issues, our first task was to formulate a more limited number of open-ended questions we could pose to members at listening sessions to try to capture wide-ranging input from members. After extensive discussion, we reached consensus on the following questions to be asked at each listening session:

1. How can we improve our union to reflect our diverse membership and create a better environment for workers seeking to organize?
2. How can our union better connect, communicate, and engage with existing members and welcome new members?
3. How should the union identify and develop future leaders?

<sup>1</sup> Sister Gonzalez participated in the organization of the COTF and the Western Territory team's listening sessions. However, she resigned her position on the COTF prior to the finalization of the COTF's report and recommendations.



4. What changes can be made to the current structures of our union to better serve the membership now and in the future?
5. Looking to the future, how should our union use our resources?
6. How can our union provide a competitive dues structure that is fair and equitable for all current and future members?
7. Any suggestions regarding anything we haven't discussed?

The COTF then scheduled and conducted 45 Listening Sessions in the following 29 cities:

- Biloxi, Mississippi
- Boston, Massachusetts
- Charlotte, North Carolina
- Chicago, Illinois
- Cleveland, Ohio
- Cocoa, Florida
- Denver, Colorado
- Edmonton, Alberta
- Fort Worth, Texas
- Halifax, Nova Scotia
- Houston, Texas
- Los Angeles, California
- Minneapolis, Minnesota
- Montreal, Quebec
- Nashville, Tennessee
- Newark, New Jersey
- Philadelphia, Pennsylvania
- Phoenix, Arizona
- San Diego, California
- San Francisco, California
- Seattle, Washington
- Toronto, Ontario
- St. Louis, Missouri
- Wichita, Kansas
- Winnipeg, Manitoba
- Vancouver, British Columbia

The COTF also conducted 12 virtual listening sessions. The in-person session in Montreal took input in French, and the virtual listening sessions specifically invited participation by both French and Spanish speakers. Ultimately just over 1,200 IAM members participated in the listening sessions.

In addition to the comments received at the listening sessions, the COTF also examined relevant work of the Purpose Institute. The Purpose Institute conducted moderated online "ideation labs" with 365 IAM members over 9 sessions in the summer of 2022 seeking responses to a series of questions. While we examined all of the ideation lab responses, we believe that the responses to three questions in particular were relevant to the COTF mission:

What strengths or capabilities does the IAM need to develop or become great at in order to be a more effective and relevant organization in the modern era?

What do you think must be done to ensure that the future generation of workers understands the value of the IAM?

What new or bold ideas do you have for reversing the decline in membership?

We found the answers to these Purpose Institute questions very much in line with what we heard about these issues in the COTF listening sessions.

The COTF met again at the Winpisinger Center in December 2023. We began by reviewing and discussing the combined input we received from IAM members. We then worked on summarizing what members told us. While we urged members to be solution focused in responding to our questions, we respected and heard the many members who identified important needs or problems, even if they weren't sure of a solution. Finally, we discussed and reached consensus on a set of recommendations which we believe reflect the collective concerns, ideas, and priorities we heard from members throughout the process. For organizational purposes, we have divided our summary and recommendations into four general categories:

- Communication and Branding
- Mentorship and Training
- Structure
- Dues



# What We Heard

## COMMUNICATION AND BRANDING

Members made it clear that continued investment in communication is highly important. Members stressed the need for communication in every form possible. They continue to value face-to-face and “old school” communications like the IAM Journal, but believe we also need to make full use of all the new and emerging forms of electronic communication and social media – YouTube, TikTok, Instagram, mass text messaging, etc. Members talked about the expense of some newer communication systems like Canva and the need for Grand Lodge support to allow locals and districts to acquire the technology and software needed for modern communication, keep the technology up to date, and receive training on using it effectively.

As a committee, we understood the term “diversity” very broadly – race, gender, ethnicity, age, religion, etc., as well as diversity of profession, wages, and other employment-related characteristics. We believe that the members who spoke about diversity generally shared this broad understanding of what it meant. There were many calls to ensure that our communications reflect the full diversity of our membership, including the diversity of the professions we represent, both internally and externally.

There was widespread recognition that we need to communicate with members in their first or preferred languages. Members stated that the only way to welcome members from diverse communities is to display that our union will adjust to their language and not force them to adjust. There was a call to develop communications and publish IAM governing documents in many languages, not just English, French, and Spanish. Translation of documents, especially collective bargaining agreements and workplace communications, into other languages was a frequent suggestion. Members questioned whether sustained, successful organizing of more diverse groups into our union could flourish when current members are rarely provided collective bargaining agreements and other materials in languages other than English outside of Canada. Members view document translation as critical to the future growth of our union.

Members also identified the need to be more intentional about matching organizers to the workers and workplaces we are organizing, citing practices like sending only English-speaking organizers to organize predominantly Spanish-speaking workers. Similarly, others talked about the value of using organizers who are local or otherwise relatable to the workers they are organizing. These comments were recurring in the majority of our listening sessions.

We also heard calls to rebrand the IAM at the listening sessions. Members feel like it’s time for a name and brand that reflects the diversity of our membership and makes our Union more relatable for all current and future members. Members also repeatedly suggested increasing the marketing of our name and brand through a robust outreach program to connect with the public that includes schools, job fairs, community events, trade shows, social media, and more traditional advertising through radio, billboards, or tv.

Members in every session had things to say about how we welcome new members to our union. Members strongly support expansion of new member orientation programs, but many thought the new member kit which has long been available through Grand Lodge needs work. First impressions matter, most who commented on it stressed the importance of connecting and inspiring engagement with the union. There were many suggestions for improvements, with an emphasis on making the kits affordable, relevant, and customizable.



We frequently heard criticism of how we collect, maintain, and share important communication information across our Union. Members feel like there needs to be a better list of mailing addresses, phone numbers, email addresses, and other avenues for getting messages to members. Many expressed frustrations with lists not being up-to-date and others talked about the need to collect more relevant information about how members can be contacted, like cell numbers for texting. They also stressed the importance of updates and new information being automatically shared at all levels of the organization.

## MENTORSHIP AND TRAINING

We received a multitude of responses about identifying and mentoring future leaders. In addition to calling for mentoring programs everywhere, many talked about using mentorship to purposefully engage members with a goal of developing leaders who better reflect the diverse demographics of our union. Members spoke about a lack of diverse leadership at a number of lodges, which in turn affects the overall leadership of our Union at every level. There was a call to develop criteria, instructions, and requirements for mentoring at every level of the organization. Many members specifically called out the LEADS program as an example of a program that works. There were helpful suggestions about using organizing tactics for identifying and assessing members to target for mentoring programs, and recognition that we can't just rely on attendance at local lodge meetings to identify potential leaders.

Members spoke of the lack of transparency around the duties, necessary qualifications, and training required for current leaders and their positions. Many members expressed interest in better knowing when positions are open and how they are filled at every level. They made clear that this was not just a problem for members trying to understand the structure and operation of their union, it's a problem for leadership development.

Our members were very clear that they view education as key to our path forward. They support providing resources to increase educational opportunities at the Winpisinger Center, but also want to see education available in the field and online. They want to see barriers to members obtaining education come down and expand the availability of education to any member. We also need to better communicate with members about education opportunities – for example, many are unaware that rank-and-file members can participate in Winpisinger Center staff programs.

The members called for continued and robust investment into employee assistance, veterans', women's, human rights, and younger worker programs.

## STRUCTURE

The responses throughout the listening sessions echoed a common lack of understanding of our union's organizational structure and operation. Members stressed the need for an organizational chart with a description of responsibilities for each position, from International President to shop steward. Members spoke of not knowing who to contact with questions or problems, or how to do so. The many titles of similar or identical positions in our union – business representative, business agent, general chair, assistant general chair -- contributes to the members' confusion about navigating the organization.

Transparency repeatedly came up as critical for engaging members and opening the channels of communication. Lack of transparency erodes trust and engagement. Members were also clear about a desire to break down barriers to the free flow of ideas and information in our union. Connected to this is a concern about unnecessary duplication of efforts. They want to see silos and divisions within our union eliminated at every level.

Members were concerned about duplication of functions and wasting resources. They supported the idea that faltering local and district lodges should be merged or restructured to avoid draining or duplicating resources needed for servicing members. The membership also called for centralized direction of strategic organizing, both planning and execution, to promote efficiency and reduce the drain on resources. For example, organizers should be able to

obtain assistance without worrying about crossing arbitrary boundaries. It was made clear that continued investment into organizing is essential to the betterment of the IAM.

Discussion of diversity also addressed structural issues. We received multiple comments on the need for the existing diversity within our union to be identified, organized, and connected to help meet the needs of the membership. Members spoke of needing to actively celebrate and participate in the different cultures our Union represents. We heard many comments on holding in-person gatherings like cookouts or participating in diverse community festivals and celebrations to build cross cultural understanding and solidarity. Some also noted that we should be more open in general to an array of activities that appeals to the diverse interests and identities in our union.

Our committee found widespread member frustration with IAM software such as VLM. These tools need to be user friendly, functional, and modernized throughout our organization. In many sessions, members reported wanting a more modern, efficient, and less duplicative means of receiving, submitting, and sharing information. There were numerous, specific requests for digital systems for things like membership applications and dues checkoffs and for implementing better systems for updating information like work status and contact information with all levels of the union simultaneously.

Finally, members really valued the opportunity which the listening sessions provided to give input and share ideas. They'd like to see this continue on a regular basis.

## DUES

In every listening session, members called for increased transparency about dues. They want to know what dues are used for at all levels, but especially at the Grand Lodge and district lodge level. Moreover, they want information about dues clearly communicated and updated regularly.

Beyond the call for transparency, the predominant responses to our question about dues centered around our union's need to modify the dues structure to better accommodate different types of workers such as low-wage, part-time, or intermittent. A clear message the members delivered was that organizing cannot expand without fixing our dues disparity issue. The members further expressed a need for a dues structure that will attract new industries without compromising the level of representation. We received many similar suggestions to address these concerns through adopting a percentage-based or other income-based dues structure. Many commentators singled out the CPI-based Grand Lodge per capita adjustment as problematic. Several suggested the elimination or reduction of initiation and reinstatement fees.

## OVERALL

Members are the bedrock of our union. At the core of our collective endeavor is the pursuit of enhancing the lives of our members, both in the workplace and within their communities. We must operate in a way that prioritizes member engagement, empowerment, service, and support at every level. That effort must be integrated. Coordination and cooperation are necessary if we are to achieve our broader mission. Leadership at every level is pivotal in making this happen, and we have to develop leaders and give them the tools and training they need.

Transparency, accessibility, efficiency, and effectiveness need to be the hallmarks of our work at every level of the union. Members need to understand, trust, and identify with their union and their role in our collective success. Ensuring that all members can participate in our union and our mission equally, equitably, and inclusively should be a paramount consideration.

We must collectively ensure judicious stewardship of our resources and responsibilities, but we can't be afraid to embrace changing technology, new members, and new strategies and tactics if we are going to drive positive change and foster growth.



# Our Recommendations

## COMMUNICATION AND BRANDING

- We recommend that we change the name of our union. We do not consistently identify ourselves – are we Machinists? Aerospace Machinists? Machinists and Aerospace Workers? IAM? We need one identity. Moreover, that identity needs to reflect who we are today. We respect our history and we're proud of it, but our history includes change and it's time to change again. Our members come from a broad range of industries and perform a myriad of jobs. We have not exclusively been machinists for decades. What we have in common is our union and our fight for justice on the job and service to the community. We are IAM – one union with one name.
- In addition to changing our name, we recommend considering changing other terminology such as "Grand Lodge." The terminology is old. It has bad connotations with some people and simply mystifies others. International or International Union, District or District Union, and Local or Local Union are all more commonly used and contemporary terms.
- We recommend that we ensure that our union's important documents and communications are provided in the languages our members speak. Going forward, we believe all Grand Lodge documents, call letters, manuals, training, and other materials which provide important information to IAM members should be produced and available in English, French, and Spanish. In addition, we should be prepared to translate these materials to other languages as needed by current or potential members.
- While we know that translating contracts is expensive, we believe it is an essential expense. No document contains more vital information for IAM members than their collective bargaining agreement. We recommend directing IAM bargainers to always propose that the employer share the cost of appropriate translation(s) when negotiating contracts covering members speaking languages other than English. In addition, we recommend that the Grand Lodge assist local and district lodges in translating contracts, including sharing the financial burden as necessary.
- We recommend investing in the staff and resources necessary to communicate with members and the public through all the evolving media platforms.
- We recommend that resources be allocated for branding, specifically for promotional branded materials as well as public relations. Members' support of a holistic rebranding extends beyond a change in name. We should be known and recognizable in the communities our members come from as well as by the broader public. External representation of the organization through swag and promotional branding is crucial. Media, materials, and merchandise should reflect the diversity of the membership and the communities and cultures of our membership as well as resonate with a broader public audience to realize meaningful community engagement and influence.
- We recommend introducing a system akin to VLodge, accessible to all members, featuring straightforward explanations of our structure, key contacts, FAQs, engaging media like podcasts and videos and other useful information. We envision a one-stop shop where members can go to access vital information related to their union membership. This system should be accessible via QR codes on membership cards.



## MENTORSHIP AND TRAINING

- We recommend developing a comprehensive mentorship program to help identify, activate, and train the future leaders of our union. The mentorship program should provide guidance, training and best practices on putting a mentorship system in place at every level of our union. The program should specifically require all Grand Lodge and Grand Lodge-supported staff to actively participate in mentoring. Mentoring programs should include accessible training elements for mentees, like the videoconference sessions and shadowing elements of the LEADS program. The mentoring program should be intentional about ensuring that it reaches the full diversity of our membership. Along the lines of the LEADS model for women, we should ensure that we target and include other groups of members who are under-represented in our leadership and activist ranks, including visible minorities, LGBTQ+, and younger workers.
- We recommend directing all local lodges to conduct comprehensive new member orientations and bargain for a designated time for further member training in all contract negotiations. If that's not achievable, the local lodge should work on alternative methods to ensure that new members receive the necessary information. To make it easier for local lodges to conduct effective orientation programs, we also recommend developing a high-quality, adaptable template along with guidance and best practices for conducting orientations.
- We recommend producing new member packets that are relevant, customizable, and affordable for local lodges to use in welcoming new members.
- We recommend that our union expand the resources it allocates to education and training. We recommend resources be used specifically to ensure that training is more accessible to all members at the Winpisinger Center, online, and in the field. We specifically recommend that online and field training programs which do not necessarily require the expenditure of union funds for member travel or lost time be open to all members in good standing and that members may self-register themselves to participate in those programs.
- To increase member engagement, we recommend establishing a continuing taskforce and/or designated position responsible for member engagement. This should include developing and tracking engagement metrics, and coordinating efforts to communicate with members, engage new members, and strengthen our existing membership base. We envision a project to specifically connect to our existing members in multiple ways with the goal of developing our capability and capacity to mobilize members for better contracts, internal and external organizing campaigns, and political fights.
- We recommend developing and enhancing steward training programs to include elements to strengthen communication and interpersonal skills including face to face communication.
- We recommend, given widespread membership support for existing initiatives like Women's Committees, Veterans Committees, LEADS, Human Rights and Young Worker programs, that resources be continually allocated into those existing programs, including conferences. Additionally, we recommend that resources go into new diversity initiatives, including conferences.
- We recommend that IAM encourage and support any efforts by members to create affinity caucuses or similar member-directed groups. We believe it is important that our union provides space and opportunities for our members to share their experiences and find mutual understanding and support. Women's Committees, Human Rights Committees, Young Workers Committees, and Veterans' Committees in our lodges have proven to be essential and effective vehicles for fostering community and developing leadership and activism among those members. This is not a recommendation to require the creation of member-directed affinity groups, but rather to support these groups' existence and activities if members work together to create them.
- We recommend that we continue to engage in political education and training for members. However, we believe that political education and training should be issue focused as opposed to promoting specific candidates or parties.





## STRUCTURE

- Members are very positive about the recent change which allows videoconference meetings, but many lack the technology and know-how to fully embrace that opportunity. We recommend developing hands on training to help local and district lodges adopt videoconferencing and run virtual meetings as well as helping lodges acquire the technology required to do so.
- We recommend developing and publishing a clear organization chart or infographic with plain language descriptions of the leadership positions at every level of the union. This information should be readily available to all members.
- We recommend making information about open leadership and staff positions throughout the union readily available to all members. This should include a description of the role and responsibilities of the positions.
- We recommend that all levels of our union be intentional about better reflecting the diversity of our membership in hiring or appointing staff or other positions.
- We recommend a thorough review of all existing software programs used by leaders and staff throughout the union to ensure that they are up-to-date and user-friendly.
- We recommend development of a fully integrated and user-friendly membership system, including important elements like fully digital membership applications and dues check-off authorizations insofar as possible.
- We recommend exploring and developing a modern membership card which is electronic or allows direct digital access to important systems and information.
- We recommend that all local and district lodge executive boards receive training in their roles and responsibilities to include training in strategic planning and budgeting as soon as possible upon assuming their offices. We further recommend considering requiring executive boards at all levels to produce annual strategic plans and budgets.
- We recommend that the Grand Lodge regularly assess local lodges and act more aggressively to merge those that are not adequately functioning – for example, lodges which regularly cannot fill officer positions, obtain quorums for doing business, meet financial obligations, make required filings, etc.
- We recommend that the Grand Lodge undertake a review of district and local lodges with overlapping jurisdiction in a geographic region and merge or otherwise restructure those lodges if doing so will reduce duplication and use resources more efficiently and effectively.
- We recommend that the strategic coordination and support for collective bargaining which has occurred through the Aerospace Department, the Automotive Department, the Healthcare Department, and the Woodworkers Department should be extended to other key sectors where we bargain with common employers nationally and internationally.
- We recommend that the Grand Lodge centralize the planning, direction, and execution of strategic organizing campaigns with targets in different territories and districts. Our decentralized organizing structure has impeded our ability to effectively organize such strategic targets.
- We recommend that the Grand Lodge take action to use consistent terms for essentially the same positions throughout our union. For example, members and even staff are regularly confused about who a general chair is as opposed to a business representative.



- We recommend strategic use of our resources regarding staff level meetings. While we recognize that conferences provide important opportunities for engagement, training, and camaraderie for members and staff, there is a point of diminishing returns. We recommend that wherever staff level meetings can be conducted virtually, they be done virtually, so as to both reduce costs related to travel and not unnecessarily impede crucial representation work.
- We recommend that we continue to expand resources into both internal and external organizing.
- We recommend that the Committee on the Future remains a viable committee into the future as a means to regularly survey and engage with the membership in order to shape the internal direction and policies of our union.

## DUES

- We recommend that we adopt an income-based percentage system for dues. We recognize in doing so that there may be a need to establish upper and lower limits. We believe this structure addresses the barriers which our existing dues structure poses in organizing and will result in a more equitable system for all members, especially low wage and part-time members.
- We further recommend moving away from the current flat-rate per capita adjusted by CPI and adopting a percentage-based system for Grand Lodge and district lodge per capita. We recognize that additional study will be required to determine what percentage would be necessary and adequate for the Grand Lodge per capita and, of course, districts and local lodges will need to do the same. A member's final dues rate will be a combination of a Grand Lodge, district lodge, and local lodge percentage. In addition to producing a fairer system as noted above, this also addresses the frustration of members who see their dues increase when their wages do not. Dues don't go up unless wages go up.
- We recommend that the IAM produce and make readily available a plain language explanation of where dues money goes on a regular and recurring basis.
- We recommend eliminating Constitutional provisions regarding minimum initiation and reinstatement fees.