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An Activist AFSCME Local Confronts Welfare Reform

Helena Worthen, Steve Edwards and Diane Stokes

Abstract

Public sector welfare caseworkers confront shifts in U.S. welfare policy internally, facing changes in their own workplaces, and externally, in relation to their clients. This paper looks at an activist AFSCME caseworker local in Chicago to see how it responded to these internal and external challenges. It compares the strategies of two campaigns, in terms of their timelines, goals, educational needs, and strategic concerns, including relationships with other parts of the union. The paper then draws lessons about alliances with other organizations, the need for a program of maximum mobilization, and development of strong and educated secondary leadership.

Welfare reform, as part of a broad political agenda, impacts the human service workforce as well as welfare clients. "Reform" of the workforce takes the shape of downsizing or consolidating human services agencies, discouraging hiring, increasing workload, creating incentives to privatize, weakening union protections, and encouraging the development of a multi-tier workforce. "Reform," with regard to clients, takes the shape of withdrawing essential cash assistance support, increasing the difficulty of applying for support, discouraging applicants for benefits (see Figure 1), promoting the illusory promise of self-sufficiency through low-wage work, while making it easier for states to use funds intended for support to "supplant" funds raised for other purposes. Implementation of welfare reform squeezes the welfare workforce between management and the unemployed clientele that it is supposed to serve. The many forms

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KUDOS!!

When it comes to working with TANF applicants, **Tammy Pierce** and **Linda Carter, Jefferson County** caseworkers, are pros. Tammy and Linda meet with every person who comes into the office to apply for TANF before they see an Intake worker. They talk to the applicant about their situation, explain TANF work requirements and stress that the applicant must immediately begin an intensive job search.

Linda and Tammy give the applicant job referrals right away and ask them to have at least 10 job contacts each week. They remind the applicant they must go into an employer and apply for a job (not just make a phone call) and tell them they will verify their contacts.

Tammy says their strategy is working: "We convince most applicants that they're better off going to work than getting on TANF. We're really positive about work and we remind them that their clock is ticking!" Linda stresses that they encourage everyone to apply for medical benefits, food stamps and child care even if they decide not to apply for TANF.

Figure 1

KUDOS!! is an article from the February 1999 issue of the Illinois Department of Human Resources Local Office Update. It reports how two county caseworkers discourage potential welfare applicants from applying for benefits before they have even seen an intake worker. Although it is the intake worker who is supposed to determine the eligibility of potential applicants for benefits, these two caseworkers convince "most applicants that they're better off going to work than getting on TANF." This flyer suggests that Tammy and Linda caused 40 out of 45 people who had planned to apply for TANF to change their minds.

that resistance to this squeeze adopts should be seen as aspects of a broad strategy to protect the provision of social benefits.

This paper describes the ongoing efforts of an activist AFSCME [American Federation of State, County, and Municipal Employees] local in Chicago representing welfare caseworkers—employees of the Illinois Department of Human Services (IDHS)—to mount a fight against welfare reform on these two fronts, the workforce and the clients. Drawing on the experience of two of the local union leaders, the president and vice president (who co-authored this paper), it looks first at a campaign to prevent the discharge of three social service career trainees (SSCTs). It then turns to the record of participation of the local with community based organizations in workers' rights boards and accountability councils. Viewing the community as the ultimate client, these boards and councils provide community oversight of their neighborhood welfare offices. The paper explores the circumstances around these two efforts, the first involving bargaining history going back fifteen years, the second involving aligning public employees with the public interest in the face of an anti-government public mood. Noting that this fight back engages the members, local union leaders, and the District Council levels of the union, this paper then suggests some lessons learned and problems still undressed.

The Impact of Welfare Reform on Welfare Clients

The 1996 Personal Work Opportunity and Reconciliation Act (PWORA) block grants funds to states to carry out welfare activities previously funded at the federal level. It replaces AFDC (Aid for Families with Dependent Children), an entitlement program, with TANF [Temporary Assistance for Needy Families], which limits federal assistance to any single family to a lifetime maximum of five years and requires that adults engage in work or "work activities" such as immediate job searches. While welfare reform assumes that welfare should be replaced by employment, what has happened is that, while caseloads have certainly dropped, people remain in poverty. According to Women Employed, a Chicago advocacy group, families headed by adults who are available to work and currently (2001) receive welfare number 36,000, down from 165,000 (or 78 percent) in 1994, but the median wage of working welfare leavers six to eight months after leaving welfare is \$7.41 per hour, less than half the Chicago self-sufficiency wage for an adult and child of \$16.21 per hour (WE-WIN, 2001).

Meanwhile, PWORA gives states wide discretion over how to apply block-granted funds. State-level agencies can re-direct funds, generate surpluses, and create contractual relationships that turn these surpluses into profit. Where states before welfare reform often spent 95 percent of their funds on direct cash assistance and administration (Johnson, 2000: 2), many states now spend 40 percent or more purchasing services such as child care, transportation, and job training. States also practice "supplantation," which directs funds not spent on welfare to purposes like roads and bridges. While a few states (Connecticut, Kansas, Illinois, and Missouri) spend all their TANF funds, forty six states did not, and thirty states had 10 percent or more of their TANF funds unspent at the end of fiscal year 2000, amounting to more than \$8 billion authorized by Congress for welfare programs but not distributed (National Campaign, 2001). In Wisconsin, two private for-profit and three non-profit companies contracted to administer welfare programs were able to generate a contract surplus of \$65 million dollars, out of which they were able to keep a profit of \$27 million (AFSCME, 2000).

In the above examples, discretion is exercised at levels above the local welfare office. But, discretion is exercised at the local office, too. The local office is where moving people off the welfare rolls and finding other support programs takes place. In Illinois, the process of moving people off the welfare rolls has mirrored the national story: in 1999, Illinois was 20th in the nation in percent of decrease in the welfare rolls (National Campaign, 2001: Appendix R). Illinois is considered one of eleven high-impact states for the labor supply effects of welfare reform (mainly, increased employment rates of less-educated single mothers) because it has a slower-growing economy combined with historically more liberal welfare laws and larger welfare caseloads (Bartik, 1998: 19; Bartik, 2000: 1). Chicago, specifically, has seven low-skill workers looking for each existing low-skill job (Kleppner and Theodore, 1997). These are the situations where caseworkers exercise discretion. They make determinations about the eligibility of the low-skill workers and less-educated single mothers (who are the statistically typical welfare applicants) for a share of what is left of the state block grants, that is, benefits.

Thus this massive change in public policy meets the public in the welfare offices, where caseworkers and other human service workers have had to be the instruments of its implementation (see Quint and Widom, 2001)(see Figure 2).

HELP THE CLIENTS

MEMO TO ALL UPTOWN STAFF FROM MANAGEMENT, WHO AGAIN URGE YOU TO HELP THE CLIENTS, AND WHO HEARBY ANNOUNCE THE NEW REVISED CASH APPLICATION AND CASH SWAP APPLICATION PROCESS:

1) WHEN THE CLIENT FIRST MENTIONS THE WORDS, "CASH APPLICATION", THE CASEWORKER IS INSTRUCTED TO NOTE THAT, PER THE CLIENT'S HOROSCOPE, THE OUTLOOK IS DISMAL FOR BENEFICIAL CHANGE IN THE CLIENT'S LIFE.

2) IF THE CLIENT PERSISTS, THE CASEWORKER MUST REQUEST THE CLIENT TO ROLL DICE FOR BOXCARS (12) ON THE FIRST TRY. FAILING THIS, THE CW TURNS DOWN THE CASH APPLICATION OR CASH SWAP REQUEST. IF THE CLIENT DOES ROLL BOXCARS, THE FIRST TIME AND...

3) IF THE CLIENT HAS THE AUDACITY TO CONTINUE TO REQUEST FINANCIAL AID, THE CW PUTS CLIENT THROUGH "THE CEREMONY OF THE CAVE".

IN THE CEREMONY OF THE CAVE, THE CLIENT MUST DETERMINE THE EXACT SHAPE, SIZE AND ULTIMATE SIGNIFICANCE OF THE OBJECTS -ANIMATE AND INANIMATE- THAT ARE CASTING SHADOWS ON A CAVE WALL. THE CLIENT SITS SHACKLED IN FRONT OF THE FIRE AND WEARS SHADED GLASSES AND LOOKS AT THE WALL THROUGH 2 SEPARATE PANES OF FUN-HOUSE ALTERED GLASS. IT IS ASSUMED THAT THE CLIENT HAS NOT EATEN FOR 2 FULL DAYS PRIOR TO THE CEREMONY.

4) FOR THE CLIENTS WHO ARE SUCCESSFUL AT IDENTIFYING THE OBJECTS IN THE CAVE, THERE IS ONLY THE TIMED TRIATHALON TO COMPLETE IN 3 MINUTES OR LESS. THE APPLYING CLIENT MUST CARRY ALL FAMILY MEMBERS DOWN TWO FLIGHTS OF STAIRS TO A POOL, PLACE THEM IN A TINY ROWBOAT THAT IS LEAKING AND ROW THEM 800 FEET TO A BICYCLE WITH A LARGER BASKET, INTO WHICH EVERYONE IS PLACED BUT THE CLIENT WHO BIKES THEM UP A 43% GRADE FOR 2000 YARDS.

5) ALL SUCCESSFUL CLIENTS MUST BE GIVEN AN APPOINTMENT WITHIN THE NEXT 4 MONTHS, EXCEPT DISABLED CLIENTS WHO MAY BE IGNORED FOR UP TO 6 MONTHS.

6) ALL CASEWORKERS, WHO WISH TO ADVANCE IN THE AGENCY, MUST NEVER EVER REFER TO THESE RULES FOR CASH APPLICATIONS AND SWAPS. THEY MUST JUST REFER VAGUELY TO "AGENCY POLICY" WHEN QUESTIONED ABOUT CONCISE AND FAIR PROCEDURES.

HELP THE CLIENTS

Figure 2

This gallows-humor flyer was circulated among caseworkers to satirize the changes in welfare policy that have increasingly placed DHS employees in an adversarial relationship with clients.

The AFSCME Local Representing Caseworkers

AFSCME Local 2858 is a union representing about 500 welfare caseworkers and occupational rehabilitation services counselors (ORS) at eight different work locations throughout Chicago. The four smallest workplaces in Local 2858 have about 20 workers; one has 80, one has 100, and the largest has about 200. Local 2858 is one of four locals of welfare caseworkers in Cook County, the county that includes both Chicago and some surrounding suburbs. The other three are larger: Local 2806 on the South Side has 1,700 members, Local 2808 on the West Side has 750 members, and Local 2854, Central (downtown) has 850. The membership of these locals is mostly African American women, with a large proportion of white and a smaller proportion of Latinos.

In turn, these locals are now part of AFSCME District Council 31. Historically, the welfare caseworkers were part of a statewide independent local (Local 2000). Founded in 1965 as the Independent Union of Public Aid Employees (IUPAE), Local 2000 went through two major strikes in 1966 and 1967, and joined AFSCME in the 1970s. In 1998, the leadership of Local 2000 led it into an affiliation with AFSCME District Council 31 following a bitter election. The affiliation resulted in the breakup of Local 2000 into 17 different parts, 12 being merged into existing locals, the other five, which included the four in Cook County, becoming new locals.

The current leadership of Local 2858 came into power during the first election in the new structure in 1998. The insurgent slate was called "Members for a Stronger Union." The opposing slate was drawn from the leadership of what used to be statewide Local 2000. The insurgent slate (which included the two co-authors of this paper) won and took over just when welfare reform began impacting both welfare clients and the human service workforce.

This current leadership has attempted to build a membership structure that will support ongoing activism. It set a goal, as suggested by the state council, of one steward per 20 members and, in most offices, the union is at or close to this goal, although the level of training and ability of these stewards is somewhat varied. The local has also sent more than a dozen of its members to labor education programs. Some stewards have been known to receive and process as many as six to eight grievances a week for an office with 100 members. Because of the large turnover in the workforce, the local emphasizes meeting with new hires, following how they are being trained and treated by management, informing them of

their rights, and working with them to file grievances early in the process, if necessary. This effort has paid off: the local has been able to mobilize for legislative campaigns and contract campaigns using phone and fax campaigns, picketing, demonstrations, and t-shirt days. As will become apparent from the following story, the local has also been able to mobilize to respond to a crisis.

The crisis we are about to describe had its genesis in a little-noticed side agreement to a contract signed in the mid-1980s. This side agreement allowed the creation of a trainee job title that was to be filled with workers who would have fewer union protections. At the time, this seemed relatively unimportant to the union. However, as pressure on the workforce increased into the late 1990s, this weakness turned out to be critical.

Three Workers Threatened with Losing Their Jobs

On April 5, 2001, three employees at the IDHS Lower North office learned they were about to be fired when the secretary for the office manager dropped sealed envelopes on their desks, notifying them that “pre-separation” meetings had been scheduled for them a few days later. A mood of anger and resentment spread among the workers. The three workers were social service career trainees (SSCTs) and had been on probation for 12 months. According to the contract, 12 months of probation should have meant it was time for them to be upgraded into human service case-worker (HSC) positions. Instead, they were being threatened with losing their jobs.

One of the three, George, a middle-aged black man, had a family of eight children to support, as well as a responsibility for his mother, who had serious medical problems. The second, Priscilla, a black woman in her thirties, was a veteran who often had to take time off from her job to assist her elderly mother, a diabetic who had suffered two strokes. The third, Dorothea, was a white woman in her sixties who had numerous medical problems and sole responsibility for the care of her grandchild. The reason given for the discharge was that they each had several tardies, likely related to their family responsibilities. All three were qualified for upgrade into HSC positions: they had master’s degrees and the HSC title only required a bachelor’s degree.

To understand how these workers whose probationary period was over could face discharge so abruptly requires an appreciation of the struggle between union and management over job titles, in which race, educational qualifications, examinations, union protections, pay grades, and probationary periods all play a part.

The story begins with a civil rights case. In the 1970s, Local 2000 fought and won a major lawsuit against a racially biased, two-tier system. This two-tier system involved case aides and caseworkers. The lower category of case aide was mostly held by African Americans who had been promoted from clerical paygrades and who were found to be performing essentially the same work as the mostly white caseworkers. Because clerical paygrades did not require a college degree and caseworker paygrades did, a product of this struggle was an agreement whereby clerks could continue to promote to caseworker with time served counting the same as a college degree. Although this was considered a "win" for the workers, with massive back-pay settlements going to those who had stayed the course, the legal battle took 10 years to complete.

Through the 1980s (Illinois got a public sector collective bargaining law in 1984), the caseworker position went through a series of title changes. While each title change was part of the give-and-take of bargaining, with each change the employer gained the ability to revise the promotional examination and the educational requirements for promotion, to the point where it became almost impossible for a clerical or service grade employee to promote into the new title. In this way the gains made in the 1970s were gradually eroded.

During the 1980s, IDHS created an altogether new title, which almost went unnoticed by the union. This new title was social service career trainee (SSCT). Workers hired into this 12-month trainee title would be in the bargaining unit and would pay union dues or fair share payments, but the catch was that during that 12 months they were cut out of having key union representation, such as the right to file grievances over discipline and discharge. This was the change that would eventually lead to the current crisis.

Beginning in the early 1990s, stewards and activists noted a tightening of discipline in the offices. At the same time, and perhaps partly because of this, there occurred an overall change in the workforce. What was going on was downsizing by attrition. Many employees who had personal problems of various kinds, causing them to run afoul of existing time and attendance policies, and of newly enforced rules of personal conduct, were squeezed out during this period. There was a marked increase in lengthy leaves of absence for illness, frequently identifiable as stress-related. In addition, many older workers did not have computer skills, received no computer training, and were discouraged by the increase in amount of computer-based work they had to do. Those who qualified and could afford to quit eagerly seized an early retirement buyout.

With welfare reform in 1996 came new duties for all casework staff. Under TANF, caseloads were being reduced and clients were being shifted to other aid categories such as MANG (Medical Aid No Grant) and Food Stamps (for a discussion of caseworker behavior relating to this shift, see Quint and Widom, 2001). Eligibility interviews that had only taken minutes in the past now required filling out 17 pages of forms, so in practice, workloads increased (AFSCME, 1999). Punitive deadlines were imposed on caseworkers to enforce this speedup. While delivering support to clients through the welfare system has never been easy, the welfare caseworker now felt more than ever like the enemy of the client. The dramatic increase in workload (see AFSCME, 1999) caused a host of grievances to be filed by stewards throughout the state beginning in 1996.

Once again, union strategy met management strategy. The grievants won upgrades, but management created yet another job title: human services caseworker (HSC). Then, under the guise of collaborating with the union to create a suitable examination for the new HSC title, the introduction of this examination was delayed, and during that delay, a large-scale expansion of new casework staff—ironically, lobbied for by the union and client advocacy groups—materialized in the form of a mass hiring of SSCTs, the job title created in the 1980s. The workforce was now flooded with people who had limited union protection: the strategy of the SSCT title became clear.

Management promised the new SSCTs that their probation would last no more than 12 months, that they would be trained for the complex job, would have less responsibility than HSCs, and a lighter caseload. In most instances, management kept none of these four promises. Privately, management would misinform the SSCTs that their probationary period was actually 12 to 18 months. Training was inadequate, the responsibility was the same as for HSCs, and caseloads of 450 to 900 clients were dumped upon them. Workers in this job category were widely abused, yet, though they paid union dues, they lacked basic union protections: According to the contract, they could not file grievances over discipline or discharge, or even have union representation in a disciplinary or pre-disciplinary hearing.

During the next master contract negotiations, the union won language giving locals the right to represent the SSCTs in disciplinary and pre-discharge meetings. Although the right to grieve an unjust discharge or discipline was still lacking, this created an opportunity. In some offices of Local 2858 where stewards were the most effective, the local set up special educational meetings for the SSCTs to explain to them what kinds

of protections the union could now provide. The local then filed various types of grievances for individuals as well as group grievances. For example, since one of management's rationales for the low pay and unprotected status of SSCTs was that they would be doing less work, the local grieved for an immediate upgrade when an SSCT was asked to do a full caseload of work. If workers were doing two caseloads, as some of them were, the local demanded double pay for double work. The local also challenged management's stretching of the probation period from 12 to 18 months.

One of these grievances about the length of the probation period was a group grievance filed in the Lower North Office in Chicago. As SSCTs, George, Priscilla, and Dorothea were parties to this grievance. When it reached the fourth, or pre-arbitration level, upper management, without formally settling the grievance, passed instructions down the line to lower management to revert back to choosing between promoting or terminating employees at 12 months. In other words, at the fourth level, the union won. However, in the Lower North office, management retaliated by "choosing" to terminate George, Priscilla, and Dorothea.

Local Union Response to Retaliation Against SSCTs

When the three SSCTs received their notice of "pre-separation" meetings, the local, understanding that it had to move fast, planned their fight back around three goals. The first two goals were to prevent firing and to publicize how bad conditions are at a state agency, where workers who had daycare and elder care responsibilities could be fired for "tardies." The third goal was to dramatize how important it was to fight for full union rights for everyone.

First, the local filed an unfair labor practice (ULP) with the Illinois State Labor Relations Board to put pressure on management at both the local and regional level. The complaint was filed for retaliation against the three trainees for exercising their union rights, that is, for having grieved probationary periods that went beyond 12 months.

Second, the local planned two demonstrations to take place a week after the ULP was filed. The first demonstration was planned at the Chicago Human Services office, where the regional management was located. Inside this office were the people who would actually make the determination of whether the three SSCTs would be fired or not. Several local officers and a delegation of activists from other organizations—the Chicago Worker's Rights Board of Jobs with Justice, the Chicago Interfaith Committee on Worker Issues, and members of the University of Illinois

Graduate Student Employees organizing committee—demonstrated early in the morning, greeting workers and upper management when they came into work with flyers explaining the situation. A second demonstration was held at noon about a mile away, at the worksite where the three workers were having “pre-separation” hearings with management. Several activists from Jobs with Justice participated in this demonstration also.

However, it would have been a mistake to assume that the entire local membership was in sympathy with this mobilization. It turned out that the long-term workers, whose jobs were secure, were least supportive. Thus, it was necessary for members of the Executive Board to hold a lunchtime meeting in the office to create a stronger mood of solidarity. The long-term workers ultimately saw that if they could save the jobs of these three trainees, they would strengthen themselves if they had to take on a bigger fight. At this point, the workers pulled together and helped in the third part of the campaign by putting in calls to two state representatives who were on the state House of Representatives’ committee that oversees IDHS.

The ultimate result was that management was forced to back down. George, Priscilla, and Dorothea kept their jobs; ironically, one of them received a promotion. The ULP was withdrawn. While the details of the settlement were concluded through interactions between management and the union at the District Council level, the engine that moved the campaign was clearly the activism of the local. They had put on a swift, effective campaign that involved a worksite emergency planning meeting; a ULP; two public demonstrations with pickets, flyers, and demonstrators from other organizations; a worksite meeting to recover unity; and phone calls appealing to state legislators.

The Union and the Community: Workers Rights Boards and Accountability Councils

In the story of saving the jobs of the three threatened workers, Jobs with Justice, the Chicago Interfaith Committee on Worker Issues and the Graduate Student Employees activists played important roles. Many unions look at coalition work as a necessary part of the political process and a way to practice solidarity across workplaces. But for welfare caseworkers whose clients are the community, coalition work is more than that. Which IDHS office a person goes to for benefits is determined by where a person lives. So coalition work is a way for IDHS employees to proactively establish relations with the community or even neighborhood in which their clients live. Unless the caseworkers take the initiative, management will

control the relationship of the welfare office with the community. However, coalition work is never easy, and Chicago is no different. Many (not all) community-based organizations reflect the political culture of Chicago, which is big-city machine politics.

Nevertheless, Local 2858's outreach effort has produced some meaningful victories. It has led to participation on workers' rights boards with Jobs with Justice and the Interfaith Committee on Worker Issues; work with the Organization of the NorthEast (ONE), an umbrella community group; the Campaign for Better Health Care; the Illinois Hunger Coalition; the Illinois Coalition for Immigrant and Refugee Rights; and the National Center on Poverty Law, among others. The local leadership is also active in the Labor Party. It is currently making attempts to link up with the other Chicago caseworker locals and other local unions that are engaged in reform efforts. In particular, the local, in partnership with several of the above organizations, has played a pioneering role in the creation of two (shortly to be three) accountability councils, which bring workers, client advocates, community members, local welfare office management, and public observers together in regular encounters to overview the operations of an entire welfare office.

The Accountability Council project was initially proposed to the local by ONE, based in Uptown, one of the most ethnically and economically diverse neighborhoods in the city. Their proposal offered the following formula: the council would be based in the welfare office in that community. Management and the local would each be assigned two representatives, and it would be up to each entity to decide how its representatives would be chosen. The community would get six representatives, divided into two each from grassroots client groups, advocacy groups, and other groups based in the community. The body, thus constituted, would meet monthly to discuss issues related to improving the functioning of the welfare office as it would serve the community.

Before the local agreed to become involved in this process the leadership of the local suggested that the two entities, the local and ONE, first work together on a joint project. This developed into two public hearings in the summer of 1999 to investigate "The Realities of Welfare Reform," in which Jobs with Justice, a group the local already knew to be effective, union-based, and interested in creating union-community links, worked with the Interfaith Committee on Worker Issues to set up hearings before an unofficial body known as the "Workers' Rights Board." Workers' rights boards are a project which is sanctioned by the Chicago Federation of Labor but consists mainly of clerics and academics who hear

testimony and take resolutions arising out of that testimony to pressure employers or government on the issues concerned.

IDHS management was invited, but did not participate, in these two hearings in each of which six welfare caseworkers and six clients or their advocates testified as to their actual experiences of the welfare system. The state union body, AFSCME District Council 31, supplied expert help in crafting testimony for the first hearing, and in the second, the other three Cook County welfare locals were involved and all gave testimony. Testimony was given about one practice in particular, in which mass mailings would be sent out on a Friday calling welfare clients to come in for a meeting the following Monday. When the clients failed to appear (having likely not received the mailing) their cases would be cancelled. This helped produce lower caseloads, one of the goals of "welfare reform."

An immediate result of these hearings was Council 31 raising the issue of the mass mailing at a statewide labor/ management meeting a few months later (August 1999). Management initially refused to discuss the mass mailing with the union, but after the local president intervened to point out that direct testimony to this practice had been made at the Workers' Rights Board hearings, a sequence of memos appeared IDHS. They did not acknowledge that mass mailings on short notice had been an explicit policy, but they put on paper that this practice was not (or no longer) policy. The first, ostensibly written the day after as the labor-management meeting (August 25, 1999) and signed by B.J. Walker, director of the Division of Community Operations, declared:

...It has come to my attention that we are using mass call-ins of TANF clients inappropriately. That is, clients who should be sanctioned are being cancelled instead. Effective immediately, all office should end mass call-ins of clients for redeterminations.

This memo was covered by another memo also dated August 26, 1999, from John Hartnett, chief of the Office of Labor Relations, saying, "Due to a staff misunderstanding, the attached memo did not go out..." which in turn was covered by a letter from Hartnett to Henry Bayer, executive director of AFSCME Council 31, again saying "...the memorandum was not sent out as reported."

Balanced against the crisis in the life of a person, whose welfare benefits have been cut off, these memos do not appear to weigh heavily. Nor was the battle over. A few months later AFSCME District Council 31 sent around a survey asking workers to report efforts to discourage

applicants from getting benefits. Soon another memo, this time from local office management, appeared (see Figure 3). The culture of welfare reform at the local level is to find as many ways as possible to remove people from the welfare rolls or discourage them from applying. This memo makes explicit that the policy of IDHS is that "All clients of IDHS are entitled to all programs they are eligible for."

Thus the involvement of Local 2858 in the workers' rights boards was considered a success. In the months following, the local partnered with ONE and other community groups, mainly ethnic/language associations, to found the first (currently there are two) local office Accountability Council. The leadership of the local successfully argued for four representatives for itself, rather than two, and with the support of the community groups established the right of the local president to serve on the Council as a facilitator and also as an alternate delegate. A code of conduct was agreed upon which included as its first and most important item, "no retaliation" for things said or done at the meetings.

It became obvious rather early on that management was not enthusiastic about an accountability council. It was clearly going to work, as had been intended, to keep the welfare office publicly accountable to the community. Caseworkers would be able to present their views before the public as separate from management. To begin with, the request of the local union and all the other groups involved to meet during working hours and on paid time was flatly denied. This meant that the council had to meet in the evenings, and that workers had to give up their personal time to serve. Most agreeably, and to management's undoubted surprise, none of the local union's volunteers for the council was discouraged by this. The presence of rank-and-file workers in all of the meetings made it impossible for management to engage in its usual tactics of blaming all service-related problems on the individual worker. Against their firmly expressed insistence that labor/management issues would not be addressed in the council's meetings, management was forced to discuss issues related to working conditions wherever they could be raised as impacting client service.

A variety of issues have come up so far. The local union representatives put forward the principle of no retaliation against caseworkers (and found that this principle was not obvious to people from the CBOs). At one point management put forward "the moral responsibility of the clients to learn English" with which the local disagreed. The local union proposed to put into the hands of the client a checkoff list of all the kinds of aid that the client is entitled to apply for and found that this was

DATE: 12/13/99

All clients of IDHS are entitled to all programs they are eligible for. At the point of Intake a client's application is an application for all programs. If a client asked for just one kind of assistance, the caseworker still reviews the client's eligibility for all assistance programs, and informs the client of their eligibility for other types of assistance. This same procedure is in effect for Service Coordination. The client does **not** have to specifically ask for a type of assistance. If you see that the clients income or some other eligibility factor makes them eligible for additional assistance, tell the client and take the necessary actions.

Example 2: (See PM 11-02-03) Your AABD client, Mrs. Doe, reports to you an increase of income. You identify that this increase of income will make her ineligible for cash. What is the next step you take? Answer: **Make a determination of eligibility for a Zero grant AABD case.** Do not automatically change the case to MANG SPD!

When in doubt about a client's eligibility rights, use TMI, the paper manual, ask your supervisor to find the answer. If no answer is found, we will call Policy and Training for assistance. Also, when you get a new policy release, review it, so you are aware of new or a change in policy. This way if something comes up about this policy you are more likely to recall there has been some change, then you can look it up to get the details.

AR:FR

Memo to caseworkers from management.

controversial. Another issue was the lack of ventilation in the office itself.

In deciding whether or not to continue to invest member time in the accountability councils, the local has to ask both if it has accomplished anything and if it has prevented anything. While "holding management accountable" may seem like a holding action, it nonetheless positively affects people whose lives are vulnerable to small changes in access to resources. In addition, it serves as a forum in which to test to see what kinds of allies the local has and the kind of power it has in this situation.

Lessons Learned: Principled Alliances, Maximum Mobilization, and Strong Secondary Leadership

The story of the workers threatened with discharge illustrates the local's response to management's strategic exploitation of a weakness in the contract that was more than 10 years old, a weakness that seemed trivial until the pressures of welfare reform came to bear on it. The story of the coalitions involved in the workers' rights boards and the accountability councils illustrates the local's response to the positioning of welfare caseworkers, under welfare reform, as the enemies of clients and the community. Behind both stories is the story of the continuous background effort to build a structure that can support ongoing activism, plus the effort to swing that structure into action when needed.

The two campaigns can be compared across the criteria in Table 1. While there were clear differences between these two types of campaigns, this comparison also reveals some interesting similarities. First, both campaigns originated from the bottom up, from the rank and file or from the neighborhood. Although AFSCME has an effective state-level (and national-level) mobilization strategy called PEOPLE, neither of these campaigns came out of a PEOPLE campaign. These two campaigns came out of the local union because of situations that arose there. Second, although the campaigns were responsive to the events that stimulated them, the types of demands that this union made in both campaigns reached farther than the crisis or circumstance that triggered the campaign. These demands have a public face; they integrate the immediate crisis with a long-term demand: getting the three workers reinstated is integrated with publicizing both the conditions of public sector workers and ultimately the goals of public service, as seen by these workers. The demands push the envelope for what might be considered related to the particular situation. Third, these campaigns both reach as far into the public and

Table 1

Campaign	Internal: Three workers	External: Accountability Council
Timeline goals	<p>Short: days, one or two weeks</p> <p>To get the workers reinstated;</p> <p>To inform public about the DHS workplace;</p> <p>To teach workers and the public about the importance of having full union rights;</p> <p>To keep members mobilized.</p>	<p>Ongoing, long term</p> <p>To hold management accountable in public;</p> <p>To distinguish DHS employees from management in the public eye;</p> <p>To work as allies with community groups;</p> <p>To test alliances;</p> <p>To educate the public;</p> <p>To educate CBOs about union rights;</p> <p>To inject worker perspectives into IDHS decisions.</p>
Education needs	<p>Education about discharge issues; education of dissenting workers about solidarity; education of the public about DHS; education of agency personnel about problems of workforce.</p>	<p>Education of management in public forum; education of community groups; development of secondary leadership</p>
Minimum Expectations	<p>Development of more informed, mobilized, proactive membership.</p>	<p>Development of local leadership as spokespeople to community</p>
Strategic concerns	<p>This campaign's success depended on having resources and members ready to act quickly.</p>	<p>Before getting involved, local tested the strength of the alliance; other alliances found to be not worth the investment of time. Can a "holding action" justify spending energy of volunteer rank and file?</p>
Relation to other parts of the Union	<p>Potential commonalities with other Chicago case-worker locals; stimulation of responsiveness from District Council.</p>	<p>Possible example for other locals. Example for District Council to investigate.</p>

the community as they can, using as many of the tools of labor action as possible: informational pickets, flyers, demonstrations, the structures of representation, and confrontation.

Campaigns like these shine a bright light on what was invisible before: the tremendous power and inertia of the conservative agenda that has been building for at least 30 years. One of the clear lessons of this local's effort is that a local union cannot successfully win these struggles alone. Until now, the local leadership has had no choice but to rely on existing organizations that are too tied in to the existing political structure to be ultimately effective in what amounts to a struggle against that structure. Real gains in future struggles will require the development of new organizations or a process of reinvigorating existing ones or, very likely, both. Glimpses of such organizations may be seen in Chicago in the resistance that has grown up in 2001 against utility shutoffs based on extortionate energy prices. This is forcing realignments among existing groups and a questioning of established relationships. A recent election in the Chicago Teachers Union has brought in an insurgent reform slate. An anti-FTAA (Free Trade Area of the Americas) committee has emerged, backed by most sections of the official union movement (at least nominally but, in some cases, with the commitment of actual, if limited, resources), as well as a multitude of other groups. The arrival in Chicago of coalitions of youth, unions, and other groups opposed to the corporate agenda of which welfare reform is a key component—sometimes called the “Seattle phenomenon”—offers hope that as the welfare workforce gets younger, it will sooner or later take on some aspects of that phenomenon. Finally, the increase in unemployment and disappearance of the labor shortage as the country moves into recession will throw the basic assumptions of welfare reform into question.

The implications of these realities for union strategy are clear, if difficult to implement. First, principled alliances with all groups, especially working class groups willing to engage in struggle, must be pursued. While this may mean a period of testing the strength of each alliance, as this local did, these common struggles are what lay the basis for trust and future common action. The same could be said for alliances with other union locals. Second, internally, unions need to engage in a continuous strategy generating maximum mobilization. In most cases, opportunities of that sort will come from the grassroots up, not from the top leadership down. Last and even more important, unions need to equip their members with open discussion and debate (not just pep rallies), external use of

labor education, and serious reliance on more and more empowered stewards and secondary leaders.

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