

NEA's Guide to a Successful Member Organizer Program

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The National Education Association (NEA), the nation's largest professional employee organization, is committed to advancing the cause of public education. NEA's three million members work at every level of education—from pre-school to university graduate programs. NEA has affiliate organizations in every state and in more than 14,000 communities across the United States.

Our Leadership:

Rebecca Pringle, NEA President
 Princess R. Moss, NEA Vice President
 Noel Candelaria, NEA Secretary-Treasurer
 Kim A. Anderson, NEA Executive Director

NEA Executive Committee:

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INTRODUCTION:

Why Member Organizers?

As with everything we do when it comes to membership recruitment and engagement, **the people are the key**. This guide will help you and your team identify the right people, plan the appropriate training for them, and support them with follow-up and accountability. This process will help us reach our goal of building the Association/Union and expand our power as we grow. NEA's year-round organizing plans include incorporating one-on-one organizing conversations and utilizing actual members to have the conversations. When we systematize that tactic, we are using Member Organizers.

Member Organizers:

- ▶ **Expand the capacity** of leaders and staff to recruit and engage members in the work of the Association/Union. Leaders and staff can't be everywhere. More people doing the work means more work is getting done.
- ▶ **Increase opportunities for existing Association/Union members** to engage with other members and potential members. Expanding the leadership and engagement potential of individual members builds overall power for the Association/Union.
- ▶ **Help an affiliate or local build power** by engaging members and potential members in conversations about membership, political action, bargaining priorities, and professional needs. These relationships translate into ready networks of members who can help move their circle of influence to action for issues that further Association/Union priorities.



Sandy Rohn, ESP, Florida



What is a Member Organizer?

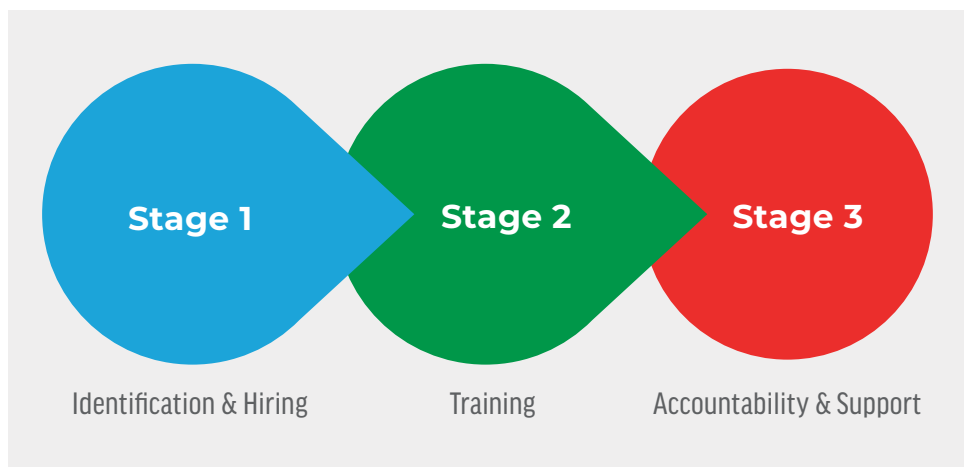
Definition: **Member Organizers** use targeted data to expand the capacity of the local/affiliate to recruit new members and engage potential members by having one-on-one conversations, but also through other strategic organizing tactics identified by the local/affiliate. Member Organizers are typically paid for their time and travel, as this work typically occurs outside of the regular workday and at various locations.



What is a Building Rep/Association Rep?

Definition: **Building Reps/Association Reps** are the voice of and conduit between the Association/Union and the members at the worksites. They engage and/or recruit members and potential members at their worksites on behalf of the local Association/Union.

Overview of Planning



STAGE 1:

Identification & Hiring

IDENTIFY Your Member Organizers

- ▶ **Have a process** designed for the identification of MOs with inclusiveness of all aspects of Association/Union members in mind—from racial diversity to variety in years of experience, from early career educators to more experienced, and both teachers and Education Support Professionals.
- ▶ **Utilize data** from a variety of sources, including NEA 360 and VAN, to identify potential activists along with information from site visits and leader identification assessments on current and potential members to build your applicant pool.
- ▶ **Communicate the process** for hiring or joining the team to the potential pool of MOs.

Stage 1 Best Practices

Member Organizer Program Best Practices Checklist

- IDENTIFY** Your Member Organizers
- Have **CLEAR EXPECTATIONS** for Member Organizers
- Prepare a Member Organizer **ORIENTATION/ONBOARDING**

The keys to a successful Member Organizer Program are:

- ▶ **Objective 1:** Planning ahead for thoughtful identification and hiring of Member Organizers.
- ▶ **Objective 2:** Clear expectations.
- ▶ **Objective 3:** Strong skills training and practice.
- ▶ **Objective 4:** An accountability process for following up.



PRO TIP: Train a big enough pool of candidates so you have alternates to fill open spots if you lose some during the year. Ask successful Member Organizers for recommendations of others who might be interested in this work.

STAGE 1:

Identification & Hiring *(Continued)*

Have **CLEAR EXPECTATIONS** for Member Organizers

- ▶ **Have clear written expectations** for MOs and include schedules (*for training, debriefs, check-ins, etc.*), data collection requirements, conduct, dress, confidentiality, and sharing of information.
- ▶ **Set specific goals for MOs**, such as number of contacts or New Ed cards per week, number of recruits, number of work hours per week expected, etc.

Prepare a Member Organizer **ORIENTATION/ONBOARDING**

- ▶ **Create a contract and handbook** for Member Organizers with all the materials needed for record-keeping, payroll, training guides, etc. Include enough time in your training plan to go over these items.
- ▶ **Encourage success** and be enthusiastic about their potential for success.
- ▶ **Designate start and end dates** for the Member Organizer Program.

Not every Building Rep/Association Rep is cut out to be a Member Organizer. Consider other individuals who might have shown interest but are not currently in a leadership role.

For examples of priorities and expectations, see:

Appendix A: Ohio Member Ambassador Priorities; and
Appendix B: Alabama Independent Contractor Agreement and Member Organizer Voucher Form.



PRO TIP: Engaging Early Career Educators (ECEs) as Member Organizers has a dual purpose:

1. ECEs directly engage with their Association/Union to build power.
2. ECE potential member recruits see themselves in the Member Organizers and are more likely to join when asked.

STAGE 2:

Skills Training & Practice

Develop a Training Plan

Maximize your Member Organizer Program's potential for success by being deliberate in your training, offering opportunities for real-life practice, and being prepared to retrain and/or follow up once the work actually begins.

Address issues that come up in training. If you see reluctance or weaknesses during the training and practice, it will likely not improve over time when they are in the field without intervention. MO work is not for everyone.

If you want your MOs to utilize and collect data through a particular technology (*like VAN or NEA360*), be sure to incorporate that into the training plan. Spend the time that data collection deserves, because without good data there can't be follow-up. Without follow-up, there won't be positive outcomes for engagement in the future.

Stage 2 Best Practices

Member Organizer Program Best Practices Checklist

- Schedule a reasonable length with time to practice and not feel rushed.
- Model what you want Member Organizers to do before, during, and after contact with potential members.
- Train MOs to use the technology reporting tools.
- Spend time on administrative items such as timesheets, logs, etc.

For examples of organizer training agendas and calendars, see:

Appendix C: Nebraska Agenda for Member Organizer Training; and

Appendix D: Nebraska Overview of Winter Organizing Calendar.



PRO TIP: Demonstrate and have MOs practice everything they are expected to do. Leave nothing to chance.



STAGE 3:

Support, Monitoring, & Accountability

Keeping Track Through Monitoring and Support

Once your Member Organizers are chosen and trained, the important work of follow-up begins.

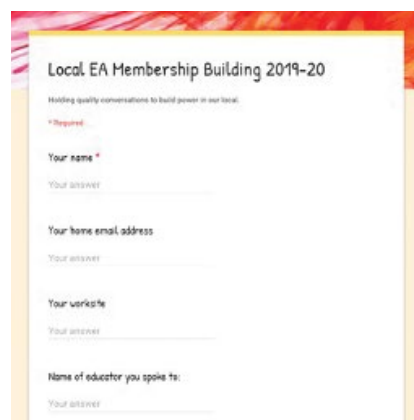
When you planned your program, you chose goals for the overall program (e.g., number of New Ed cards to collect, number of one-on-one conversations with New Employees, percentage of new members recruited, etc.). These goals should translate into individual goals for your Member Organizers to work toward, and for the program leads to monitor.

Consider creating a Lead Member Organizer position to help coordinate paperwork, data and data technology support, coaching, etc.

Stage 3 Best Practices

Member Organizer Program Best Practices Checklist

- Set program goals and communicate them** to all, with incremental progress checkpoints (e.g., recruit 10 members a week versus recruit 100 members for a campaign).
- Schedule check-ins and data reviews in person and virtually.** Maintaining regular contact and relationships with your Member Organizers keeps them motivated and on track.
- Establish a calendar with timelines** for check-ins, data collection, and reports.
- Have a plan to use the data collected** for follow-ups and further engagement beyond membership recruitment.
- Celebrate progress with the team**, individually and collectively. This is not easy work.



The image shows a screenshot of a Google Doc survey titled "Local EA Membership Building 2019-20". The survey includes a header with the title and a sub-header "Holding quality conversations to build power in our local." Below this, there are four required fields, each with a red asterisk and a "Your answer" label: "Your name", "Your home email address", "Your work life", and "Name of educator you spoke to:". Each field has a corresponding text input box.

Sample from Arizona – Member Organizer Webinar Resources "Arizona: Member Organizer Data Collection Google Doc Survey"



PRO TIP: Schedule your check-ins and follow-up meetings ahead of time, before they actually begin working. Treat the scheduled check-ins as an imperative part of the workday for Member Organizers.



Member Organizers in Northwest Arctic, Alaska

Heading into a bargaining year, the Northwest Arctic Education Association and the Northwest Arctic Educational Support Personnel Association of the Northwest Arctic Borough School District (*District offices located in Kotzebue, Alaska*) used a Member Organizing Program to engage their current members and recruit new members. In most other places, this plan would present some challenges, but for the leaders in the Northwest Arctic, Sam Dutton and Mandy Hill, the challenges were opportunities.



Village worksite



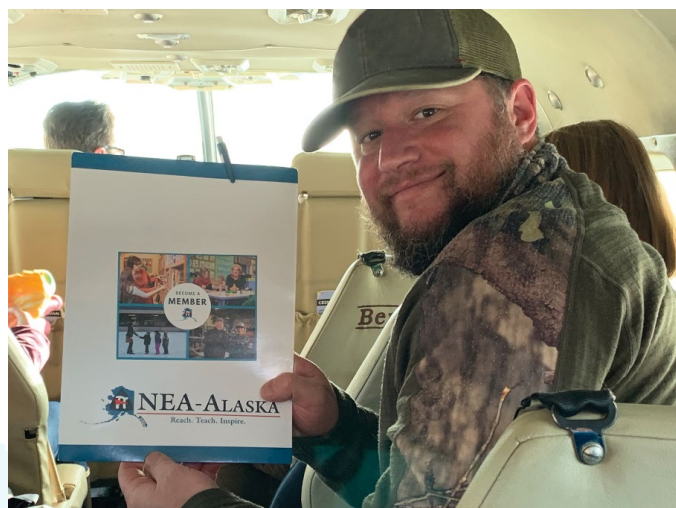
Alaska bush plane waiting for MOs

What They Did:

Over four days in September 2019, members were trained and then conducted organizing conversations around key issues like overcrowding, staff turnover, and housing for educators in the remote villages. Member Organizers flew in and out the same day on bush planes, and while the number of potential members in each of the villages was relatively small, in many cases they were able to recruit everyone who was eligible to join.

The Results:

Each village is unique, with cultural differences and challenges that make them as distinct as a separate school district. By expanding the locals' capacity and using Member Organizers, both locals accomplished in one week what would have been nearly impossible for a lone staff member or leader to do in the same amount of time. Both locals increased their membership, grew in strength, and actively engaged their members while putting faces and names to the Association they belong to. Member organizing works!



New Member recruit on bush plane (this member signed while on the plane after talking to a Member Organizer).

ADDENDUM

NEA's Guide to a Successful Member Organizer Program

NEXT STEPS:

Leveling Up Your Member Organizer Program

Member Organizers expand local and affiliate capacity to recruit and engage members and potential members, and were essential to pandemic and pandemic recovery member engagement and recruitment. This guide aims to share best practices to sustain Member Organizers once hired and trained. After your Member Organizers are recruited, employed, and trained, the critical work of follow-up and retention begins. We know that Member Organizers who work over multiple campaigns experience more success than those who are newly trained, so the efforts to retain experienced Member Organizers must be planned, intentional, and ongoing.

In general, the most successful Member Organizer programs **build and nurture relationships** through **strong communication** with program staff and leads as well as other Member Organizers. A by-product of those strong relationships is a **sense of community, camaraderie, and collaboration** that helps Member Organizers succeed in their immediate work and see a pathway to deeper engagement and leadership in their union.



Build and Nurture Relationships



Celebrate and Report on Success



Foster Community Interaction



Provide a Pathway for Deeper Engagement

Build and Nurture Relationships through regular communication (both in person and virtually) from program staff or lead Member Organizers.

- ▶ **Weekly Team Meetings:** Local teams should meet regularly (weekly or bi-weekly) with program staff or Member Organizer leads to go over results from the prior week, discuss their game plan for the upcoming week, and troubleshoot any issues. Here is a [sample agenda](#). These meetings should be agenda-driven and last no more than 45 minutes to one hour.
- ▶ **Regular Workshops:** Offer a training series that focuses on topics to enhance organizers' skills and knowledge. Take a look at a sample [training series agenda](#).
- ▶ **Virtual Office Hours:** Create opportunities for Member Organizers to informally interact with leads and staff to ask questions, get assistance, or share information. A consistent one-hour pop-in time works well.

Celebrate and Report on Success by collecting information and sharing with all the Member Organizers.

- ▶ **Reporting Forms:** In addition to the raw data for the number of 1:1 conversations, members recruited, events held, etc. that you may be tracking, ask organizers to complete a weekly reporting form of anecdotal information about their work that week. It will help staff and leads monitor the work on the ground and have information to share and celebrate or issues to address. Here is the [weekly reporting form](#) that was used for Nebraska's Education Summer program.
- ▶ **Highlight Updates:** Consider creating a consistent format to share updates using tools such as Publisher, Canva, etc. Use these updates to communicate with Member Organizers and highlight organizers' work, report the latest results, and provide learning opportunities. This is a great way to acknowledge the organizers' work and encourage them, too. Here are some examples of [newsletters](#) from the Nebraska Education Summer Program.

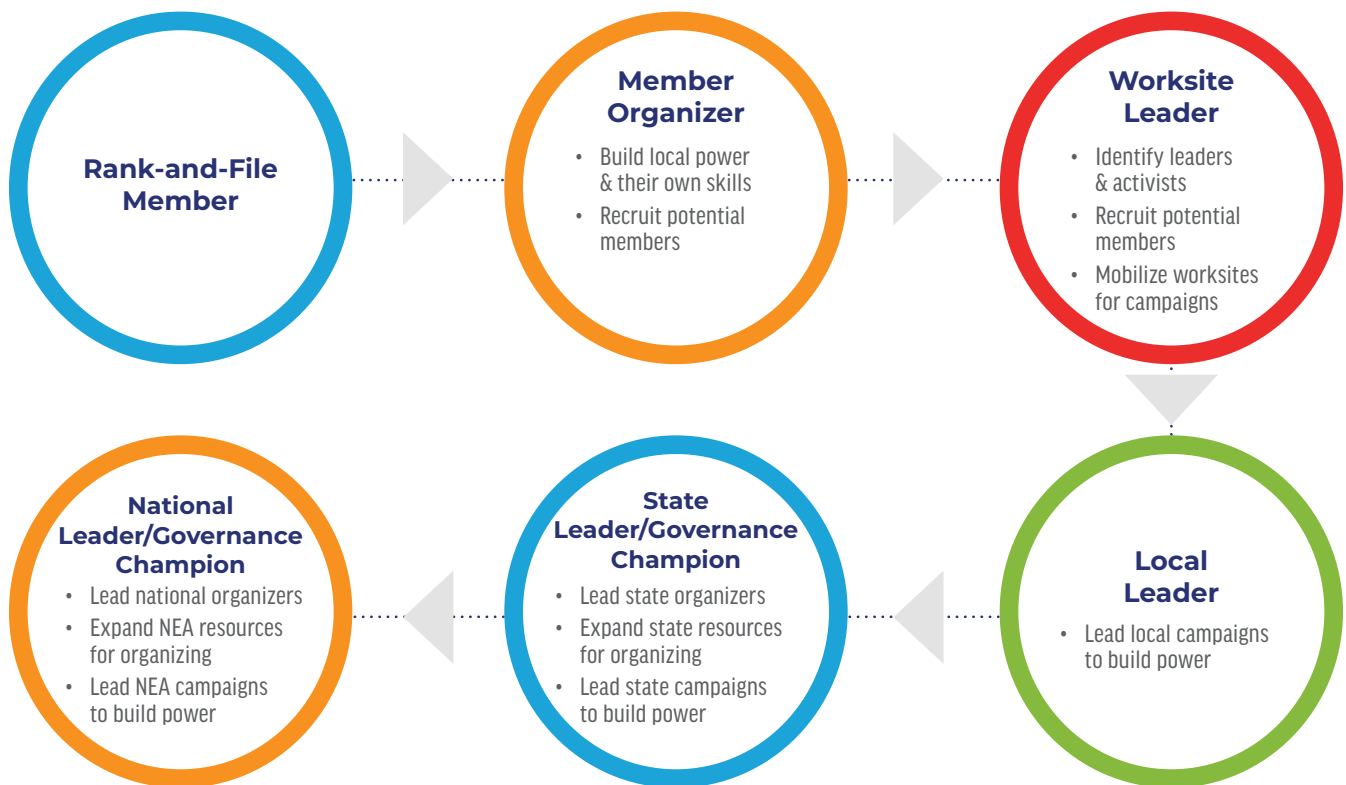
Foster Member Organizer Community Interaction for camaraderie and collaboration.

- ▶ **Private Facebook Group:** Creating a private Facebook group for Member Organizers creates community among the organizers. They can use the page for sharing success stories and photos from events or encouraging each other. It's also a great place for staff and leads to share tools, flyers, new information, or hot takes from their work the previous week.

Provide a Pathway for Deeper Engagement in the union as a future committee chair, elected leader, worksite representative, or even a local, state affiliate, or national staff person.

BUILDING 21ST CENTURY UNIONISM

Organizing Leadership Development Pathway



The pathway to leadership for Member Organizers begins when prospective Member Organizers are identified and begin their training, building local power and their own skills through membership recruitment. Member Organizers can continue on the pathway to build their skills and increase their engagement in union work by becoming a Worksite Leader or Local Leader and perhaps even a State or National Leader.

ADDENDUM

Member Organizer Quick Answer Guide

KNOW BEFORE YOU GO

Member Organizers do not have to have *all* the answers to questions from members and potential members, but can use this guide to help prepare for transformational organizing conversations and typical questions.

It's All Right Here!

- ▶ Local leader names/association rep. names by worksite?

- ▶ Dues information (per paycheck)?

- ▶ Committee & volunteer opportunities for members?

- ▶ Resources available (worksite level, local level, state level, national level)?

- ▶ Political Action Committee or other electoral/legislative information?

- ▶ Competing organization facts?

AHUY Planning Guide

Ask

What open-ended questions will you ask to get to know your member/potential member?

HOPE

Share your plan to win or previous successes based on BRAG

URGENCY

What will you say to communicate that NOW is the time to act (join, sign, show up, etc.)?

YOUR CALL TO ACTION

Can we count on you?

B.R.A.G.

BENEFITS



*What are the advantages of being a union member?
e.g.: collective voice*

RESOURCES



How can/does the union support me in my work and professional life?

ACHIEVEMENTS



*What have we achieved that makes a difference in my professional life and the lives of the students I work with?
What is the local/affiliate proud of?*

GOALS



What are we/should we be working to accomplish that will make a difference in my professional life and the lives of the students I work with? What is the local/affiliate working on?

Member Organizing Pathway to Leadership



Jennifer Kinkade, a speech-language pathologist in St. Lucie County, FL, was engaged with her future union even before she could officially be a member! She began her union work collecting signature cards from her fellow speech-language pathologists to help the Education Association of St. Lucie certify a third bargaining unit of professional-technical employees not represented by any other union. That new unit, Pro-Tech, became a part of the Education Association of St. Lucie (EASL) in 2018. The union president tasked Jennifer to work as a Member Organizer in 2019 to help build the Pro-Tech membership. After a year of work as a Member Organizer, membership grew, and Jennifer was recently elected to represent her unit on the EASL Executive Board. In November 2021, the EASL Pro-Tech unit, with Jennifer and her colleagues, ratified their very first union contract.



APPENDIX A:

Ohio Member Ambassador Priorities

1. Fully execute the New Educator (New Ed) Campaign on behalf of Ohio's New Educators (ONE) and the Ohio Education Association (OEA)
2. Develop an Early Career Educator (ECE) group in the local Union;
3. Cultivate a relationship with District Leadership (i.e., NEOEA, ECOEA, NWOEA, NCOEA, etc.) and attend district events on a regular basis. Organize at least two socials (one in the Fall and one in the Spring) in the district for ECEs;
4. Develop a relationship with the local Union Labor Relations Consultant (LRC) and keep them informed of ECE events in their area;
5. Work with the local Leadership Council and attend meetings on a regular basis and keep them informed of the New Ed campaign progress and other ECE events/opportunities;
6. Invite new educators into membership with OEA;
7. Have new educators in assigned turf fill out New Ed interest form and enter data into the online location (tinyurl.com/oeanewed);
8. Like the ONE Facebook, Instagram, and Twitter pages (OHneweducators);
9. Subscribe to the ONE e-mail newsletter and GroupMe account;
10. Have regular support/engagement conversations with new educators and record in MiniVAN;
11. Drive new educators to events (i.e., socials, leadership, professional development, district engagement, etc.);
12. Identify at least four (4) new natural leaders and drive them to leadership opportunities;
13. Recruit and engage aspiring educators. Invite all student teachers in the local Union into membership with the Ohio Student Education Association (OSEA);
14. Maintain good lists and keep good records.

APPENDIX C:

Nebraska Agenda for Member Organizer Training



APPENDIX D:

Nebraska Overview of Winter Organizing Calendar

Winter Organizing Calendar

Purpose: To Receive Time Sheets; Provide New Time Sheets; Gain Signatures and Documentation; Provide Further Information

January 24th – Main Training for Half Price Dues

- Requirements/Reporting Forms/Calendar and Due Dates/Potential Lists

January 31st – Chili's at Oakview (4:30 to 6:00)

- Theme: Story of Self 2.0 – Wrap
- Turn in Member Forms/Time Sheets – Get New Member Forms/Time Sheets

February 7th – Chili's at Oakview (4:30 to 6:00)

- Theme: How to Log Information
- Turn in Member Forms/Time Sheets – Get New Member Forms/Time Sheets/Potential Lists

February 14th – Chili's at Oakview (4:30 to 6:00)

- Theme: 10-Minute Meetings
- Turn in Member Forms/Time Sheets – Get New Member Forms/Time Sheets

February 21st – Chili's at Oakview (4:30 to 6:00)

- Theme: Revisiting the 1:1 Conversation (Difficult Questions/Challenging Conversations)
- Turn in Member Forms/Time Sheets – Get New Member Forms/Time Sheets

February 28th – Chili's at Oakview (4:30 to 6:00)

- Theme: Preparing for Early Enrollment
- Turn in Member Forms/Time Sheets



Additional Resources Available
(email yro@nea.org for design files to print).