UNITING OUR MEMBERS AND THE NATION

Empowering leaders, educating students, strengthening communities

Let Data Help Make Your Job Easier (And How to Do It!)

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• NEA Leadership Competency Progression
  Level:
  – Level 1: Foundational

• NEA Leadership Competency Themes:
  – Identifies sources of union, financial, and educational data to assess the impact on association sustainability and decision making
NEA Strategic Goal and NEA Organizational Priority

• NEA Strategic Goal:
  – Strategic Goal 1: Strong Affiliates for Educator Voice and Empowerment

• NEA Organizational Priority:
  – Early Career Educators
Data...The Good, the Bad, and the Ugly

• What do you know about data?

• What does data make you think of?
The Good

• Provides a target for actions to take
• Helps identify “vague” problems
The Bad

• Data is not omnipotent
• Data can be misleading if it is incomplete
The Ugly

- Data is a word that can sow distrust
- The so-called “creepiness” factor
Beware of the Source of the Data

• Did members explicitly consent to providing the information?
• Be prepared for a reaction from members when sharing data
Two Types of Data

- Primary
- Secondary
Primary Data

• Association is the source of the data

• Advantages:
  – Association controls the data
  – Able to target data and reach conclusions that other sources are unable to do
Primary Data

- Disadvantages:
  - Data harder to obtain
  - Need to be able to capture and retain data
  - Data may not be complete
Secondary Data

• Data from an outside source
• Advantages:
  – Easier to acquire
  – Can be comprehensive and possibly peer reviewed
Secondary Data

• Disadvantages:
  – Outside parties may have same data
  – Outside parties can reach similar conclusions about association membership
WARNING!

• Beware of third party data storage vendors, especially free ones!
• Does the “terms of use agreement” allow data provider to store, use, or sell member data?
• Be sure to check, or association may be selling member data!
Why Use Data?

• Data is a tool meant to help
• Data helpful in gaining efficiency
• If association has limited resources helps to make sure resources are not wasted
Is the Financial Model Sustainable?

• Financial health goes beyond one year
  – Multi-year budgeting
  – Long term goals

• How are you planning your membership for two, three or more years into the future?
  – Is it realistic?
  – How would you know?
Data and Long-term Planning

• Membership trends
  – Which way are they headed?
  – What does that mean for the dues?

• If you are counting on 5% growth, do current trends support that?

• If you are counting on the same number of members as last year, what factors should you look for to ensure you are on track?
Can Data Help Right the Ship?

• Example – the membership is decreasing
  – Do you know why?
  – What to do? less money, so less to spend
  – What is a priority? What programs can be put off?
  – Can data be used to determine what programs are driving membership (and hence dues)?
Return on Investment

• Adding members takes time and money
• If an investment is made in resources will it be a waste?
• Which resources to use?
• Where to deploy?
• How can data help answer these questions?
Adding Members is Adding Revenue

• Can data help with this?

• How do you add members?
Blitz Planning Example

• What does blitz planning involve?
• What resources are available?
  – Resources available for a limited time
  – Out of state or National staffing assistance
  – Funds for materials and staff time
Blitz Planning Example (cont.)

• Why do a blitz?
• What does the association hope to accomplish?
  – May be an inefficient way to gain membership
  – Beginnings of a self-perpetuating system
  – Creates interest in the union
  – Influences others and shows why membership is important
Blitz Planning Example (cont.)

- How should the association begin the blitz?
- How does the association identify the worksite that will be self-perpetuating?
Factors to Consider When Choosing the Blitz Target

• Size
• Likelihood of success
• Which individual should be targeted?
  – Person with influence
  – Person with same values as the association
  – Others
• Building size and activist scoring are already available data points
Using Data

• Data is helpful for supporting a decision
  – Will the data support the hypothesis?
  – What if the data is contrary to a commonly held view or belief?
Data Don’ts

• Data should not replace people
• Data should not replace critical thinking
  – Beware of data that appears to correlate but in fact does not
  – Use data to test a hypothesis
  – Use data to analyze patterns
  – Use data to analyze the conclusion
False Correlations!

**US spending on science, space, and technology** correlates with **Suicides by hanging, strangulation and suffocation**

<table>
<thead>
<tr>
<th>Year</th>
<th>US Spending on Science</th>
<th>Suicides</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999</td>
<td>$15 billion</td>
<td>4000</td>
</tr>
<tr>
<td>2000</td>
<td>$20 billion</td>
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<td>8000</td>
</tr>
<tr>
<td>2002</td>
<td>$30 billion</td>
<td>10000</td>
</tr>
</tbody>
</table>

Source: tylervigen.com
More False Correlations!

Letters in Winning Word of Scripps National Spelling Bee correlates with Number of people killed by venomous spiders

Leadership Development
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Data Don’ts (cont.)

• Data can be manipulated
  – The lesson of consultants and standardized testing to evaluate teachers
Data Comes From the Past

- Can help predict future trends
- If circumstances have changed the data can become irrelevant
- Can be a pitfall when budgeting
How Data Can Solve Problems

• Does every building in a local need to be organized?

• What tools can be used to determine this?
  – Membership system information
    • Where is the member located?
    • Which members are located in each building?
    • Is the entire local leadership from the same building?
  – Activist Scoring – Catalyst
    • How do people feel about unions and what unions do?
How Data Can Solve Problems

• Members want to know what the association is doing to support them

• What tools can be used to determine this?
  – VAN – New Educator Initiative one-on-ones
    • Survey available on issues important to the member
  – Other surveys previously done by association
  – “Click through rates” on e-mails/articles to see number of members interested in the information
Plan Ahead – The Big Why!

• What information would the association like to know?
• Why is the association wanting to know this information?
  – Strategic purposes
    • Local in need of assistance
    • Ineffective school committee
    • Unpopular contracts
    • Low member engagement
Plan Ahead – The Big Why!

• To gather the most data as possible
  – Bargaining unit lists – membership systems
  – Catalyst scoring
  – Percentage of members of the bargaining unit that have already joined
What Defines Success?

• A raw figure
  – Total members
  – Total dues dollars

• A percentage increase
  – % over last year
  – % of targeted group
Tracking Goals

- Track your goals with data
- Track your goals as a return on the resources used which is helpful for budgeting
Data as a Budgeting Tool

- Guides targeted membership drives
- Helps project number of members for the upcoming year
- Assists with planning member programs for the upcoming year
Data as a Budgeting Tool (cont.)

- Budget certain expenses on a per member basis
- Assess success of current programs and if they should be budgeted for in future years
And Now It’s Your Turn

• How are you going to use data at your association?
• What other information do you need?
• What examples of data do you have access to that we have not discussed?
Finally...

• Data is supposed to help
  – It is only a help if it is helpful
• “I don’t have access to professional charts”
  – Brainstorm ways to capture data as progressing and not when inputting afterwards
Questions? Ideas?
Contact Information

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Session Outcomes

The content from this session can be used in the following ways in your current position/role:

– Organizer – planning a membership drive or blitz
– Treasurer – using enhanced membership forecasting to budget income and expenses
– President – planning strategies for the upcoming year and forecasting membership
Closing

• Please complete the evaluation for this breakout session by using the **NEA Summit Mobile APP**!

• Please visit the Leadership Development Resources website at **www.nea.org/leadershipdevelopment**