What’s in the toolkit?

The toolkit provides the organizer with a set of organizing tips and guidelines for participating in the Early Enrollment period. It offers practical tips on:

• Getting your program started;
• Setting worksite, local, and state enrollment goals;
• Supporting your recruiters with a good structure, coaching, and accountability to goals;
• Developing effective messages to use during organizing conversations;
• Having successful organizing conversations; and
• Navigating affiliate membership forms and reports.

Additionally, links are provided to various NEA resources in support of successful recruitment.
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What is the Early Enrollment period?

Any State Association may participate in the Early Enrollment program, which is designed to support Local Association membership recruitment. The program allows potential members to join the Association beginning April 1 through the start of the new school year without paying dues until the new school year starts. (Note: A Local cannot participate in the Early Enrollment program independently of a State Association.)

Details on how to participate in the program, as well as a description of the limited benefits for membership during the non-dues period, are provided toward the end of this toolkit.

What is the aim of this toolkit?

The aim of this toolkit is to provide worksite representatives, Local leaders, and Association staff access to information on the Early Enrollment period and to provide resources and best practices regarding recruitment and messaging tips for organizing.
Using the time leading up to the Early Enrollment period, Association leaders should call a meeting with their organizing committees, Association worksite representatives, and/or appropriate stakeholders to set the framework for their membership campaigns.

When formulating your membership plan, your Association should institute the following five steps:

- Conduct an Internal Analysis
- Build Your Team
- Make a Plan and Set Goals
- Identify Your Message and Talking Points
- Put Your Plan Into Action
Conduct an Internal Analysis

The beginning stage of devising a membership plan starts with an internal analysis and review of your Association outcomes and goals of the Early Enrollment period. Your Association should decide who does what and when, and build flexibility (and creativity) into the plan. At the State Association level, target Locals with the potential to lead on enrollment and growth. At the Local Association level, target worksites with the potential to increase membership.

You might target Locals or worksites based on any or all of the following criteria, or other factors important to your Association:

- Locals with strong worksite leaders who can run the membership campaign;
- Locals with greater potential for growth;
- Locals with field staff capacity;
- Locals where political capacity is needed for future electoral or legislative campaigns;
- Locals working on issues important to members and potential members;
- Locals with a recent victory; and
- Locals with a current campaign or opportunities.

At the Local Association level, analyze the data for potential organizing targets:

- New hire lists;
- Young educators: Fewer than five years of employment;
- Recently dropped members;
- Education support professionals; and
- New hires who were members of the NEA Student Program.

Build Your Team

With a strong team, your Association can unite members around a common goal and generate greater capacity. Without a strong team, you limit your ability to successfully implement your Association’s membership plan. When building your organizing team, your Association should attempt to answer the following questions:

Who will lead the recruitment campaign?
Which other Association staff will be key participants?
What role will Association leaders play?
What Association successes can you use to build your campaign around?

Pull together these committed leaders and review the internal analysis with them. Clarify who will play what role and what’s expected. Assess what training and support is needed.
Make a Plan and Set Goals

Your membership plan should be based on your analysis and review of the data. It should be authentically owned by your organizing team and Local leaders. A strong plan might include:

• Recruitment goals by Worksite, Local, Association Representative, or UniServ Director
• Goals for younger member recruitment
• Goals by job family (Certified, ESP, Student)
• Resources required, including training and support for the team and the leaders
• Materials (Flyers, Commitment Cards) and Organizing Messages

Setting Recruitment Goals

The goals set at this point should focus on the Early Enrollment period. Do Not Confuse Goal Setting with Planning Specific “Action Steps,” which will happen after your enrollment goals have been accepted by the entire organizing committee and/or Association worksite representatives.

The best Early Enrollment Campaign Goals will be:

• Specific
• Achievable
• Detailed
• Timelined
Here are two examples of how State and Local Associations calculate their enrollment goals:

**Example 1:** Our Affiliate goal is a 1% growth in targeted Locals during the Early Enrollment period, which is a total of 100 new members.

<table>
<thead>
<tr>
<th>Local Association</th>
<th>Current Membership Total</th>
<th>1% Growth Goal</th>
<th>If Goal Is Met, Membership Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunnyside EA</td>
<td>4,443</td>
<td>44 New Members</td>
<td>4,487</td>
</tr>
<tr>
<td>Smithfield EA</td>
<td>2,899</td>
<td>29 New Members</td>
<td>2,928</td>
</tr>
<tr>
<td>Bench EA</td>
<td>1,943</td>
<td>19 New Members</td>
<td>1,962</td>
</tr>
<tr>
<td>Roma EA</td>
<td>832</td>
<td>8 New Members</td>
<td>840</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>10,117</strong></td>
<td><strong>100 New Members</strong></td>
<td><strong>10,217</strong></td>
</tr>
</tbody>
</table>

**Example 2:** For all of our locals with less than 80% market share, we want to bring them closer to 80%, with a goal of having them at 80% within the next one to five years.

<table>
<thead>
<tr>
<th>Local Association</th>
<th>Current Membership Total</th>
<th>Current Market Share</th>
<th>Number of Potential Members</th>
<th>Goal for Growth</th>
<th>Goals Met: New Market Share</th>
<th>Goals Met: New Membership Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rose EA</td>
<td>874</td>
<td>78%</td>
<td>247</td>
<td>22 New Members</td>
<td>80%</td>
<td>896</td>
</tr>
<tr>
<td>Dunkin EA</td>
<td>1,465</td>
<td>65%</td>
<td>789</td>
<td>112 New Members</td>
<td>70%</td>
<td>1,577</td>
</tr>
<tr>
<td>Friendly ESP</td>
<td>456</td>
<td>49%</td>
<td>475</td>
<td>19 New Members</td>
<td>51%</td>
<td>475</td>
</tr>
</tbody>
</table>
Identify Your Message and Talking Points

What is the most important thing you want others to know about your Association? This key message is one that you should repeat over and over. To be effective, this message should be something you can say in conversation or in presentations to groups. It should be easy to remember and say – no more than 15 words. It may be simple as: “Our profession needs small class sizes.” Or, “There is no such thing as good education without a quality educator.”

Your key message should be used consistently in membership materials, newsletters, and other communications. It may also be distilled into a pithy campaign slogan. You will also need three talking points, stories, and examples that support your key message, and these may change based on the needs and interests of your audience.
Put Your Plan Into Action

Recruitment: One-on-One Contact

Few people join the Association without being asked. In fact, the number one reason potential members don’t join is because we don’t ask them to!

NEA membership studies also show that the best recruiter is a respected educator who uses their own story to share why Association membership matters.

The best investment you can make is to convene worksite leaders; train them in how to have an effective one-on-one conversation starting with “active” listening; provide them with materials that showcase the Association’s work and goals, recent victories, and member benefits; and send them off to ask colleagues to join.

Conduct an Association Recruitment Blitz

A coordinated membership Recruitment Blitz is an all-out effort to maximize your membership team’s efforts, by canvassing a specific job category or worksite location, and/or hosting an enrollment canvass by visiting potential members’ homes.

Preparation Phase

• Contact the Worksite Representative to ensure that the date and time of the blitz will work for them.
• Provide notices of the upcoming event to potential members via their mailbox.
• Pull together your Association recruitment materials. (See sample on pages 21-22)
• Inform the NEA Member Benefits Coordinator at your State Affiliate office of the upcoming blitz.
Execution Phase

• Set up information tables at your targeted worksites. Have plenty of handouts and pens on hand to distribute to potential members.
• Arrange for a membership recruitment announcement to be made during the worksite visit.
• Have members and/or leaders on hand to share their own stories, answer questions and ask potential members to complete an Association information card.

Follow Up After Your Blitz

• Make personal contact with enrolled members thanking them for joining and reinforcing their role and the contribution they can make to their Association.
• Invite enrolled members to upcoming Association activities.
• Offer transportation and/or childcare if there are challenges to an enrolled member attending.

Don’t forget to develop a calendar to target your worksite and Association representatives during your enrollment campaign blitz. Be sure to review the school district calendar for key events to organize around and events to avoid. Always work backwards to ensure that nothing is missed prior to starting your blitz.

Get Resources From NEA’s Center for Organizing Department:

• Does your team need data training? Contact Jessica Garson at c4odata@nea.org if you need assistance.
• Do you need worksite leader training on organizing one-on-one conversations and/or help developing a strategic message for building outreach? Contact Nathan Allen, Field Coordinator, at nallen@nea.org.
NEA is organizing educators, parents, and community leaders who share our commitment to ensuring the success of all our students. By tapping into this collective passion and power, we’re leading the country in fulfilling the promise of public education and preparing every student to succeed.

Yet a seemingly endless stream of attacks on the profession and the Association, coupled with changing demographics, means we can no longer depend on the old ways of recruiting and retaining members. And we all know that in order for us to win in our mission to provide a great public school for every student, we must grow our Association and our power at every worksite, Local and State Affiliates, and nationally at NEA.

From the die-hard, stalwart union member, to the millennial answering the call, to the activist-to-be, here are four steps for having a successful organizing conversation:

1. **Introduce and Connect.** What do they care about? What are their values? Listen carefully and establish a connection based on common values.

   “Here in Hernando County, we’re in a fight to ensure evaluations are done through a fair process. That’s why FEA has filed a lawsuit challenging the legality of SB 736. HCS educators work hard to make a difference and it’s only right that their evaluations are based not only on test scores of their students but on multiple measures in their classrooms!”

2. **Agitate.** What are they angry about? Anger motivates. Tap into concerns and agitate to action. Shift from an adult focus to a student-centered one:

   - **Adult-focused…**
     
     “They are basing life-changing decisions like salary and job security on the test scores of students and subjects we don’t even teach!”

   - **Student-centered…**
     
     “Teachers against tests? Teachers invented tests! A student is more than a test score and so are we! Assessments should be well-designed, timely, and monitor individual student performance and progress across a range of subjects and skills.”

   - **Adult-focused…**
     
     “An educator’s working conditions are a student’s learning conditions.”

   - **Student-centered…**
     
     “A student’s learning conditions are an educator’s working conditions.”
3. **Inspire.** What do potential members want? Connect to hopes by presenting a credible “theory of change.”

Theory of change = “If X... then Y...”

“IF we stand up to politicians and special interests **THEN** we can put an end to the attacks on public education and our profession.”

“IF we come together and have one powerful voice **THEN** we can make a difference around important issues dealing with class size and high-stakes testing.”

4. **Ask!** How can potential members get it? Collective action...personal commitment...leadership... Give them a role in the process of change. Be concrete, specific, and realistic! Build on successes!

“Here in Mississippi, the legislature is once again cutting funding for MAEP! While our students and schools are shortchanged, some big businesses are paying little to no state corporate tax. We need your voice to hold Jackson politicians accountable. Will you sign this pledge and attend a meeting hosted by MAEP to map out next steps for protecting school funding?”
Messaging your campaign is an important element to a successful early enrollment membership drive. In this section, we give you a number of different messaging options that can be used to support your organizing. It is important to note that your Association should allocate some time during the planning period to develop a brief list of all your Association’s accomplishments from the start of the school year. Use the accomplishment(s) list after you introduce them to your Association.

Introduce Your Association
• As a member of your Local Association, you automatically become part of your state Association and join thousands of other educators in your state. However, your representation does not stop at the local or even the state levels. Your membership includes national representation through the National Education Association.

• Our members include public school employees whose positions require a teaching credential or license, education support professionals, as well as college students studying to become educators, higher education faculty, and retired educators.

• Your union membership connects you to more than 3 million public school employees across the nation, and it allows you to draw upon the tremendous experience and expertise of fellow educators.

Benefits of Membership
• Our affiliate is proud of its role as the preeminent voice of public education. Our members are professionals who work with students and communities on a daily basis. Because of our vital role, it is very important that members’ needs and concerns are addressed.

Our Vision
• Our Vision is “a great public school for every student.”

Our Mission
• Our mission is to advocate for education professionals and unite our members and the nation to fulfill the promise of public education and prepare every student to succeed in a diverse and interdependent world.

Our Accomplishments
• Create a list to share with your organizers.
NEA's Core Values

• These principles guide our work and define our mission:

  ▪ **Equal Opportunity.** We believe public education is the gateway to opportunity. All students have the human and civil right to a quality public education that develops their potential, independence, and character.

  ▪ **A Just Society.** We believe public education is vital to building respect for the worth, dignity, and equality of every individual in our diverse society.

  ▪ **Democracy.** We believe public education is the cornerstone of our republic. Public education provides individuals with the skills to be involved, informed, and engaged in our representative democracy.

  ▪ **Professionalism.** We believe that the expertise and judgment of education professionals are critical to student success. We maintain the highest professional standards, and we expect the status, compensation, and respect due to all professionals.

  ▪ **Partnership.** We believe partnerships with parents, families, communities, and other stakeholders are essential to quality public education and student success.

  ▪ **Collective Action.** We believe individuals are strengthened when they work together for the common good. As education professionals, we improve both our professional status and the quality of public education when we unite and advocate collectively.

We also believe every student in America, regardless of family income or place of residence, deserves a quality education. In pursuing our mission, we have determined that we will focus the energy and resources of our 3 million members on improving the quality of teaching, increasing student achievement, and making schools safer, better places to learn.

*Note: Consider adopting and following your own association’s core values.*
Below is a sample of issues that our affiliates advocate for and could quickly be used during a one-on-one conversation with a potential member.

**Advocating for the Profession**
In every state and local, affiliates advocate for salaries, benefits, and working conditions. While these are suggested issues, please identify issues unique to your association and for which you have successfully advocated. Additionally, our affiliates ensure that member employment rights are protected.

We believe that standards should be set, evaluated, and enforced by those closest to the classroom, and that standards and policies guiding public schools should be set by democratically elected officials in an open process that invites input and review by parents, teachers, community leaders, and other stakeholders.

We support federal efforts to provide resources that go directly to the classroom for the purpose of instruction with the minimal regulations necessary for accountability and equal opportunity.

**Supporting Safe Schools**
No one cares more about safe schools than our members. The Association is active at the local, state, and national levels to promote safety for students, teachers, and others working in the schools. Safe and orderly schools are only possible when they have support from families and the community.

At the local level, members are involved in setting and enforcing discipline policies that include significant parental involvement and high standards for student conduct. We work to help students gain the skills and values they need to avoid drugs, crime, and other anti-social behavior. At the state and national level, the Association supports policies and programs that promote children’s health and safety, protecting them from weapons, violence, abuse, and environmental hazards.

**Equal Opportunity for All**
Members believe that public schools are the American institution best equipped to overcome discrimination on the basis of race, religion, national origin, disability, and sexual orientation. Actively working against discrimination is a way of instilling and modeling values of respect and responsibility and helps advance American ideals of equality, economic opportunity, and democratic participation.

**Parental Involvement**
No other organization, with the possible exception of the PTA, spends more time, energy, and resources encouraging parental involvement – from public service announcements to sharing information with parents in doctors’ offices and shopping malls, the Association is active in outreach to parents. And each day, our members communicate with parents about the needs, concerns, and successes of the children they teach.
“Silence never won rights. They are not handed down from above; they are forced by pressure from below.”

Roger Baldwin
GUIDELINES FOR PARTICIPATING IN EARLY ENROLLMENT

State and Local affiliates participating in the Early Enrollment period must meet these requirements. In addition, below are some features of the Early Enrollment period to highlight when enrolling first-time Active and new Student Program recruits.

Membership features for early enrollment of first-time Active and new Student Program recruits are summarized below:

A. Powerful Incentive

1) No Cost. Between April 1 and August 31, 2015, the NEA Early Enrollment Membership Incentive Plan offers eligible recruits no-cost access as “Insureds” in the NEA Educators Employment Liability (EEL) Program and access to select NEA Member Benefits programs. Without the NEA Early Enrollment Membership Incentive Plan, first-time Active members who sign up during the 2015-16 school year would have to pay prorated NEA dues to receive these membership benefits (NEA Bylaw 2-7).

2) Limited Eligibility. Early enrollment is limited to recruits for the 2015-16 membership year who are either:
   a. Individuals who sign up and pledge to pay unified Active membership dues as a first-time Active member beginning September 1, 2015 or
   b. New NEA Student Program recruits who sign up and fully pay NEA Student Program dues for the 2015-16 membership year at the time of enrollment.

B. Additional Benefits

Early enrollees have access to an array of NEA Member Benefits programs. Please note that first-time Active early enrollees are not eligible to participate in the NEA Complimentary Life and Introductory Life Insurance programs until their memberships are fully activated in September 2015.

For a comprehensive look at all the programs and services NEA Member Benefits offers early enrollees, visit www.neamb.com/earlyenrollee.

C. Start Date for Benefits

Access to NEA EEL Program benefits will begin no earlier than April 1, 2015. The Early Enrollment date is the date that the individual signs the state affiliate’s early enrollment form and the accompanying authorization form for payment of his or her 2015-16 dues commitment (or April 1, if signed on March 31 or earlier).

After the state affiliate has processed the early enrollment forms and added new enrollees to their membership database, early enrollees will be granted access to qualified NEA Member Benefits programs.
State affiliate participation in the Plan is optional, but participating state affiliates must meet these requirements.

The membership form requirements for early enrollment of first-time Active recruits are summarized below:

1. **The Pledge.** All early-enrollment membership forms must incorporate the following or equivalent language for first-time Active recruits who sign up for the Plan:

   As a participant in the [name of local association/state association/National Education Association] Early Enrollment Membership Incentive Plan, I am eligible to receive—prior to September 1, 2015, but in no event before April 1, 2015—benefits under the NEA Educators Employment Liability (EEL) Program, as well as access to select NEA Member Benefits programs.

   As a condition of eligibility for these benefits, I agree to pay the appropriate unified Active membership dues for the 2015-16 membership year in accordance with established payment procedures. Should I fail to do so, my eligibility to receive benefits under the NEA EEL Program shall immediately terminate. In addition, I shall become liable for the cost of any benefits that were provided to me under the NEA EEL Program prior to September 1, 2015.

2. **Enrollment Date.** State affiliate staffs are responsible for confirming the date of eligibility (enrollment) to the NEA EEL Program insurance carrier on any NEA EEL Program claim form. The enrollment date is the date that the individual signs the early enrollment form (or April 1, if signed on March 31 or earlier).

The membership form requirements for early enrollment of new NEA Student Program recruits are summarized below:

1) **Upfront Dues Payment:** New NEA Student Program recruits who sign up for early enrollment must pay the full NEA Student Program dues for the upcoming year (September 1, 2015 through August 31, 2016) at the time of enrollment.

2) **No Pledge Necessary.** Upfront payment eliminates the need for new student program recruits to sign off on the pledge. However, affiliate staffs are responsible for ensuring that membership records correctly indicate that new Student Program recruits are designated as early enrollees. Your procedure might be as simple as writing “EARLY ENROLLEE” on the membership form that you currently use, so that the information is captured on the form at the point of enrollment. Then it is available to be entered into your state affiliate’s automated membership tracking system.
GUIDELINES FOR TRACKING, REPORTING AND RECORDKEEPING FOR EARLY ENROLLMENT

State affiliate participation in the Plan is optional, but participating state must meet the following requirements:

1. **Reporting Early Enrollee Counts.** Only participating Independent Processing States (California, Michigan, New Jersey, and Pennsylvania) are required to report directly to NEA Financial and Membership Services the total number of first-time Active and New Student Program recruits who signed up as early enrollees in 2015 (broken down by month and by Active and New Student recruits).

2. **Where to Send Reports.** The reports from participating Independent Processing States are due via email to Laurie Johnson, lajohnson@nea.org on or before September 30, 2015.

3. **Recordkeeping.** Participating state affiliates must maintain enrollment records on early enrollees for a minimum of 15 years so that eligibility can be verified if an early enrollee has an EEL Program claim in future years. Upon request of NEA or the insurance company, your state affiliate should be able to provide the following backup documentation:

   a) The date on which the early enrollee signed the membership form,
   b) The date on which the early enrollee signed the payment authorization form or, for new Student Program recruits, paid the dues for the following membership year; and
   c) The date of the occurrence, if there is an EEL claim, that gave rise to the claim (the date on the membership form must be earlier than the date of the occurrence for coverage to be applicable).

See the Membership Processing Procedures for Early Enrollment for a step-by-step guide to be followed for keying, recording, and processing early enrollees.
As school employees, having our voices heard is critical if we are to ensure that every student has a quality education. We need to collectively raise our voices together by joining our local, state, and national professional association.

Leadership begins with commitment.
Membership in your professional association demonstrates your support for public education. Your local, state, and national associations have the ability to represent our collective interests around professional standards, student-to-educator ratios, licensing standards, and ensuring community support for our public schools and employees.

Membership keeps you connected.
Your association routinely provides you with what’s happening locally, statewide, and nationally. It also gives you an opportunity to network with other educators.

There is strength in numbers.
Your professional association represents educators on the issues that impact your students’ success, working conditions, professional development, competitive wages, and quality benefits.

It’s sound economics.
The benefits offered are worth much more than the cost of membership. Join for free and pay nothing until the start of the new school year.

So what are you waiting for?
Become a leader and speak out for Your Profession. Join Today!
EXPERIENCE ALL THE BENEFITS OF MEMBERSHIP

As an NEA Early Enrollee, you get access to most NEA Member Benefits programs, including:

• Savings up to 50% on everything from vacations and clothes to restaurants and cell phones
• Member-only discounts on home and auto insurance
• Free lesson plans and classroom tips
• Great deals on new and used cars

• Competitive credit card, mortgage and loan rates
• High performing savings and retirement products
• Tuition discounts and reduced fees for professional development programs and courses

Visit: www.neamb.com/earlyenrollee
Call: 1-800-637-4636
NEA and its affiliates have a host of tools and resources to make new members the best education professionals they can be:

**NEA Website**  
www.nea.org

**NEA Today**  
Updated daily, with the latest take on what's happening in the world of education news.  
www.neatoday.org  
@NEAToday

**Education Votes**  
News for activists committed to advancing education policies focused on building great public schools and benefiting all students.  
www.edvotes.org  
@EdVotes

**NEA Today Express**  
Keep up with the top education news through our monthly e-newsletter.  
www.nea.org/SignUpExpress

**Degrees Not Debt**  
A program dedicated to reducing the costs of higher education for students and early career educators.  
www.nea.org/degreesnotdebt

**Legislative Action Center**  
Take Action! Send a message to your Members of Congress about the issues you care about by visiting capwiz.com/nea/mlm/signup

**NEA & NEA Member Benefits**  
As an early enrollee, you have access to NEA's Educators Employment Liability (EEL) Insurance and programs from NEA Member Benefits.  
www.neamb.com/earlyenrollee

For benefit questions call 1-800-637-4636

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**GET CONNECTED**

We’re also on YouTube and Instagram!

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**WE NEED YOU:**  
VOLUNTEER IN LOCAL ASSOCIATION ACTIVITIES

<table>
<thead>
<tr>
<th>NAME:</th>
<th>LOCAL:</th>
</tr>
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<tbody>
<tr>
<td>ADDRESS:</td>
<td></td>
</tr>
<tr>
<td>CITY, STATE, ZIP:</td>
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