UNITING OUR MEMBERS AND THE NATION
Empowering leaders, educating students, strengthening communities

Using Membership Data and Digital Tools to Build Local Capacity
Richard Haase
BUSINESS COMPETENCY

• Acts strategically to support the association’s value proposition (Level 2)

• Utilized data and analyzes trends to inform decision making (Level 3)
COMMUNICATION COMPETENCY

• Develops a two-way strategic communication plan (Level 3)
• Uses current media, technology and social networks to communicate (Level 3)
• Develops communication approach and style to fit appropriate audience (Level 2)
GOVERNANCE AND LEADERSHIP COMPETENCY

• Effectively executes governance and leadership responsibilities (Level 3)
• Establishes and maintains collaborative relationships (Level 3)
• Develops self and others as leaders (Level 3)
ORGANIZING COMPETENCY

• Utilizes organizing best practices (Level 2)
• Makes strategic plans that rely on data and analysis (Level 3)
• Engages in collective action to identify and address pivotal issues (Level 2)
• Creates conditions for continuous association growth and strength (Level 2)
• Fosters the development of leaders at all levels of the organization (Level 1)
NEA Goals and Priorities

• **Strategic Goal:** Strong Affiliates for Educator Voice and Empowerment

• **Organizational Priority:** Early Career Educators
INTRODUCTIONS
Now your turn...

Nice to meet you! Now let’s get started...
VISUALIZE YOUR UNION’S FUTURE

WHAT DO YOU WANT TO ACHIEVE?
VISUALIZE YOUR UNION’S FUTURE

• To create a pervasive union culture throughout our district.
• To become part of every member’s professional identity.
• To have robust structures of dozens or hundreds of engaged members driving the organization.
• To be a powerful professional force in driving action within the district and community.
• To be a leader in education issues; connecting the work of our great members to the Union.
VISUALIZE YOUR UNION’S FUTURE
VISUALIZE YOUR UNION’S FUTURE

If you got your wish, could you handle it without valuable member insights and potential relationships slipping through your fingers literally *daily*?
VISUALIZE YOUR UNION’S FUTURE

BREADTH
- More events
- More actions
- More communication
- More members

DEPTH
- More value out of attending
- More ownership out of acting
- More engagement from communicating
- Deeper relationships

MANAGING

LEVERAGING
VISUALIZE YOUR UNION’S FUTURE
VISUALIZE YOUR UNION’S FUTURE
VISUALIZE YOUR UNION’S FUTURE

How can we expect to organize others when we haven’t yet organized ourselves?
VISUALIZE YOUR UNION’S FUTURE

• Where will your local be in 2020? 2025?
  – Every day you wait to start is another day you’re surpassed by your opponents.

• Nearly all work is evolving this way, whether we like it or not.
  – Workplaces need to account for technology and data in budgets, staffing and strategic planning.

• A strong digital infrastructure is NOT about replacing your ground game.

But let’s get back to your vision...
Anyone who said things get easier as more people get involved was lying.
VISUALIZE YOUR UNION’S FUTURE

Manage increasingly complex networks of people doing stuff.
VISUALIZE YOUR UNION’S FUTURE

Manage increasingly complex networks of *people doing stuff.*

Put all that POTENTIAL ENERGY to work!

After all, energy can’t be destroyed...

It can only be stored or transferred.
NOT ALL ACTIONS ARE CREATED EQUAL

We want MORE interaction, but we also want to LEVERAGE those interactions so they help us build relationships and grow the union by moving members along the ACTIVIST PIPELINE.
NOT ALL ACTIONS ARE CREATED EQUAL

It’s not enough to simply *do more* if you’re not actually leveraging what you’re doing to build relationships, move people along the pipeline and strengthen the organization.
A PHENOMENAL FAUX PAS
How to Win Friends and Influence People

• Access leads to connection
• Connection leads to relationships
• Relationships lead to affinity
• Affinity leads to influence
• Influence leads to conversion

But enough about WHY... let’s talk about HOW!
HOW ARE WE BUILDING CAPACITY IN OUR UNION?

USING AN INTEGRATED APPROACH

LEVERAGING ‘TOUCHPOINTS’
INTEGRATED APPROACH

What it’s **NOT**...

- Access
- Salsa
- Google Docs
- WordPress
- MailChimp
- Adobe Echosign
- Twitter
- Facebook

- Sending text messages
- Recording member correspondence
- Tracking member or contract issues
- Conducting elections, ratifications
INTEGRATED APPROACH

What it IS...

• An integrated approach brings together all of our work and the opportunities and member insights that surround it.
INTEGRATED APPROACH

What it IS...

• It makes it easier to gain useful insights into members hooked into our interaction channels (conversations, website visits, event attendance, emails, text messages, etc.)
INTEGRATED APPROACH

What it IS...

- It streamlines our internal and external workflows, improving consistency and follow-through, while freeing up time to develop relationships within the union.
INTEGRATED APPROACH

What it IS...

• It enables us to interact with members in innovative and personalized ways across an ever-widening array of channels.
INTEGRATED APPROACH

What it **IS**...

- It allows us to maintain a steady focus on the member while taking advantage of 21\textsuperscript{st} century technology.
INTEGRATED APPROACH

Using Technology and Member Data to Increase Capacity...

PROJECT: Rights in the Workplace Training

WHAT will we do? Hold two separate workshops (elementary and secondary) aimed at helping members understand workplace rights, in general, and in their contract, specifically.

WHO will do it? Richard Haase, Deborah Lloyd-Priest

WHY will we do it (What is our GOAL)? According to surveys and conversations, Reps and members want to know more about what their rights are at work. We want members to understand the incredible protections built into their contract, and how fortunate they are to work under the conditions they do. We want to empower them to use their teacher voices and have faith in their craft as a way of bringing out strength and leadership qualities in them. We want to mitigate some of the work dissatisfaction that often arises from parental or administrative pressure that impact teachers daily.

HOW will we MEASURE our SUCCESS? We should develop an exit survey for participants to complete. We may also consider asking them to be “counted in” for future actions, training, BOE meeting attendance, and committee participation within the Union. We may also consider using participants as turnkeys by asking them to share what they’ve learned with colleagues who could not attend.

WHEN does this need to be done? Early December 2016

PRIORITIES

VALUES

Is this a TARGETED INITIATIVE?
☑ Values-based ☐ History-based ☐ Activist Pipeline (2s to 3s, etc.)

Explain: We will target invitations to members who have participated in training in the past. We will target level 2 and 3 members for one-on-one invitations from building reps. We will personalize email invitations based on values in the member database.

PLANNING FOR SUCCESS / RISK ASSESSMENT

<table>
<thead>
<tr>
<th>Risk</th>
<th>Likelihood (low 1-5 high)</th>
<th>Severity (low 1-5 high)</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor attendance</td>
<td>3</td>
<td>1</td>
<td>There’s widespread interest. Can target potential participants based on activist history and interests. Should market from a place of...</td>
</tr>
</tbody>
</table>
INTEGRATED APPROACH
Using Technology and Member Data to Increase Capacity...

Are we doing it because our members told us it would create value?

Will we be able to use any existing member data to improve chances of success?

Is there a strategy in place for developing activists and leaders through the campaign?

Is this a TARGETED INITIATIVE?
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INTEGRATED APPROACH

How can you use digital tools to leverage member data?

• Use attendance history to coordinate event times.
• Incorporate survey data into decision making.
• Utilize exit surveys / count me in sheets to identify and reward top activists.
INTEGRATED APPROACH

How can you use digital tools to leverage member data?

• Plan union actions based on member values.
• Use member insights to personalize emails and communication.
• Use prior event attendance to generate ‘leads.’
• Drive training based on registration data.
• Establish follow-up conversations and opportunities.

And so much more!
INTEGRATED APPROACH

What TOUCHPOINTS or interaction channels can you identify? In other words, how do your members interact with the union in ways that could provide insight?

- Memos
- Building meetings
- Email blasts
- Digital Surveys
- Paper surveys
- Phone surveys
- Events
- Facebook
- Twitter
- Instagram
- Website
- Conversation, Word of Mouth
- Calls to the union office
- Benefit paperwork
- Community involvement
- Walking down the hall
- Flyers
- Promotional items
- Text messages
- Thank you cards
- Follow-ups
- Online help
- In the media
- Representation with administration
- Recognitions
- Committee participation
- Leadership development
- Training
- Brand visibility / advertising
- Administration
INTEGRATED APPROACH

What TOUCHPOINTS or interaction channels can you identify? In other words, how do your members interact with the union in ways that could provide insight?
INTEGRATED APPROACH

Building Relationships Over Time
INTEGRATED APPROACH

Transactional AND Transformational

• Improving how we handle our core functions while expanding into new ones.
• Propelling value by engaging members more effectively.

Again, this is **not** about replacing your ground game... it’s about using technology to make your ground game stronger!
<table>
<thead>
<tr>
<th>Level</th>
<th>Member Data</th>
<th>Issues</th>
<th>Communications</th>
<th>Workflow</th>
</tr>
</thead>
</table>
| 1 Building Data / Basic Use | • Input existing member data  
• Update basic member data (address, phone, tenure area, email, mobile, etc.)  
• Use simple list views and reports to better understand members | • Keep an accurate record of issues brought to your union  
• Attach relevant notes and documents to issues for safe keeping | • Track phone calls and conversations with members  
• Design visually appealing email blasts like you would in Constant Contact or MailChimp | • Associate tasks with members, issues, campaigns and events  
• Organize events based on event type |
| 2 Pervasive Integration | • Use Districts View to drive Political Action such as voting, letter writing, etc.  
• Maintain accurate and up-to-date member data between local and NYSUT  
• See everything you want to know about individual members on their dashboards. | • Build relationships with members by following up on closed issues  
• Track progress for ongoing issues  
• Use Dashboard reminders to close issues faster | • Integrate local leader email address for tracking two-way member communications  
• Target member emails based on demographic data such as zip code, tenure area, or school  
• View open and click rates for email blasts | • Sync tasks and calendars with Google account and apps  
• Create automatic email agendas for upcoming union meetings  
• Build simple custom workflows  
• Use email templates and workflows to improve member communications based on system data |
| 3 Advanced and Strategic Use of Data | • Use Mapping Views to track values, interests, participation in outside organizations, etc.  
• Use member history and values to pair them with reps when mapping worksites  
• Keep track of member benefit status for benefit trusts  
• Send automatic updates to NYSUT, district, benefits coordinators based on member status changes  
• Use member data to inform and drive contract negotiations | • Improve communication with leadership by automating issue updates  
• Use issue history to drive decision-making, negotiations, etc.  
• Run and/or issue reports based on contract articles, membership cohorts, etc. | • Create text messaging groups based on criteria in the member database  
• Mobilize members for urgent actions using SMS alerts  
• Use member open and click rates for emails to identify interests and leads within the union  
• Compare open rates based on different subject lines  
• Use website visitor tracking to identify issues of interests  
• Alter or target messaging on issues based on member values | • Automate rep council reminders, reports and agenda distribution  
• Automate reminders or emails to assign tasks to other union leaders  
• Automate reminders and rules based on event type  
• Integrate Project Management tools  
• Build advanced custom workflows to simplify and strengthen internal union operations |
<table>
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<tr>
<th>Level</th>
<th>Activism</th>
<th>Insights and Data</th>
<th>Events</th>
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| 1 Building Data / Basic Use | • Keep track of actions members take for your union  
• Maintain a list of members to thank for actions taken  
• Keep a record of elected, appointed and voluntary positions in the union | • Upload critical documents for indexing and safekeeping.  
• Maintain FAQ/Insights module as a history for recurring issues and contract questions  
• Design and email member surveys like you would in SurveyMonkey or Google | • Keep track of which members attend your events  
• Send automatic emails to members or leaders based on date fields such as tenure date and birthdate |
| 2 Pervasive Integration | • Use web forms to record member actions  
• Use macros to automate member acknowledgements | • Embed survey results directly into database fields in the member dashboard | • Collect registrations for events on your website  
• Send automatic confirmation and thank you emails to registrants and attendees |
| 3 Advanced and Strategic Use of Data | • Run automatic activism scores for members  
• Run a data-driven VOTE/COPE campaign  
• Embed activism leaderboard on the union’s website  
• Use volunteer history to fill committees and identify leads | • Run advanced cross-module reports to gain deeper and broader member and cohort insights | • Run event attendance reports to identify leads within your union |
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• Send automatic updates to NYSUT, district, benefits coordinators based on member status changes  
• Use member data to inform and drive contract negotiations |
Now let’s check it out!
Overview

• PowerPoint
  — Why?
    • Overview / Introductions
    • Visualizing Your Union’s Future
  — How?
    • An Integrated Approach

• Zoho CRM Platform Demonstration
Session Outcomes

– The learner will begin to identify and think differently about all that members have already told and shown the unions about themselves
– The learner will understand how each interaction with a member may create multiple touchpoints for building relationships
– The learner will envision how member data can help locals make informed decisions and organize effective campaigns.
• Please complete the evaluation for this breakout session by using the **NEA Summit Mobile APP**! – *Please remember to build in 5 minutes at the end of your session to allow time for the attendees to complete the evaluation for your session.*

• Please visit the Leadership Development Resources website at [www.nea.org/leadershipdevelopment](http://www.nea.org/leadershipdevelopment)