UNITING OUR MEMBERS AND THE NATION

Empowering leaders, educating students, strengthening communities

An End to Silos
How Data, Membership, and Organizing Can Help Us All Work Together

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COMPETENCY: STRATEGY AND FISCAL HEALTH

• **NEA Leadership Competency Progression**
  - **Level:**
    - Level 3: Agenda Driving

• **NEA Leadership Competency Themes:**
  - Utilizes ratios and trends to support responsible decision making and to support association strategic plans, and strategies for membership and financial growth
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
  – My School, My Voice
Welcome to Rhode Island!
NEA Rhode Island Challenges

• Locals that appear to be the same
• Member problems that are hard to identify
  – Generalized comments “people are unhappy”
  – Fear that some members have never heard directly from the union, and hence have never felt a part of it
NEA Rhode Island Challenges

- A few activists represented the membership at large, but uncertain if representative of the population
- Not enough money, time, or staff
Silos – Good for Farms, Bad for Organizations

• Departments with a narrow focus that are not collaborative
• Can be a side effect of even the most efficient offices and workflows
Challenges When Working Collaboratively

• Uniservs meet with local leaders but may not meet with the local’s members enough
• Local leadership putting out “local fires” but may not have time to organize
Challenges When Working Collaboratively

- Membership staff has lots of information on membership but no plan for using it
- Communications has great messaging but needs help spreading the word
So...What’s the Answer?

• Efficiency
  – Limited amount of resources
  – Use resources strategically

• Data
Data Usage

- As a tool
- To gain efficiency
- Use resources wisely
- To aid in decision making
Data Limitations

DATA DOES NOT REPLACE PEOPLE!
Interpersonal Communication is Necessary

• Ensures members are getting association messaging
• Member relationships are an advantage
  – Opponents cannot replicate relationship
  – Opponents not held in same regard as coworkers or friends
• Data assists in identifying members to strengthen relationships
Lessons Learned

- NEA RI defined coworkers as members of the same local and working for the same employer

- Members defined coworkers as members in the same building
  - Some members had little familiarity with their local president who worked in a different school and with state staff that they had never met
Lessons Learned

• In order to use relationships to keep members:
  – Needed to make sure members understood their coworkers would suffer if they dropped
  – Identifying “coworkers” is a big deal
NEA Rhode Island Objectives

• Local membership rate stays at or above 20%
• Communications’ “Stay a Member” message is heard from their peers
• Identify where to send Uniservs to teach local leadership how to deliver the message so members hear it
  • Considerations – size of building membership
Tackling the Problem

• Used Uniservs to deliver the message
• Leveraged Uniservs relationships with local leadership
• Only had Uniservs work with the local leadership that they know
Data Scoring: Targets vs. Rankings

- Association did not have enough data or expertise to pinpoint specific locals to target
- Rankings of locals were used to determine where to send staff
Choosing the Metrics to Use

• Guided by the goal of getting the message out
• If a member acts on behalf of the union or uses a union service they will be far more likely to stay a member
Metrics Used for Scoring

Voting on the contract:

• Percentage of the people that voted
  – Captures apathy levels
  – 100% voting is better than 30% voting

• Percentage of the people that voted yes
  – If half voted against the contract there is a significant vulnerability that they will drop

• Degrades over time as people’s feelings fade
Metrics Used for Scoring cont.

Actions taken by leadership:
• Is the local engaged with the state?

Building representatives will need assistance creating retention plans and are invited to a state training on how to do this

— Did the representatives come to the training?
Metrics Used for Scoring cont.

Actions taken by rank and file members:

- Membership renewal
- Did they sign or pass on a petition?
- Have they positively affirmed “Yes I want to join” in the last 2 years?
- New Educator surveys
Open rate for e-mails:

- Controversial
- Problematic because you can read an e-mail in Outlook and never actually “open” it
Commitment card returns:

- Follow through of the building organizer is just as important as the collection of the cards
- Can help drive member actions
Rankings

• Rank the locals
  – Formula % voting / % voting yes
  – 10% per year out of the contract
Rankings Stage 2

• Within the locals, buildings get tiered
  – Tier one: More than one of the 4 officers’ positions of the local or member organizer
    • Local leadership is partner in spreading the message
    • Using local leadership and Uniservs helps gets the message out to a wider audience
Rankings Stage 3

• Within the locals, buildings get tiered
  – Tier two: Only one of the 4 officers’ positions of the local or member organizer
    • One engaged member helps a lot
    • More help will be needed, but may not be the building in need of the most resources
Rankings Stage 4

• A building rep who has attended training on talking about membership
  – Training building reps on how to talk to members about staying or rejoining
  – The ones who attend are assumed to be more engaged
Rankings Stage 5

• Using the average of:
  – Actions taken by rank and file members as a % of the building population
  – Open rate on e-mails as a %
  – Commitment card return as a %
Rankings stage 5, cont.

• Of the 3 averages, used the standard deviation for each:
  – Double weighted “actions taken” average as it is more important metric
  – Calculated the average of the standard deviations per category
  – \((2 \times \text{Standard Deviations for “Actions Taken”}) + \text{Standard Deviation Commitment Cards} + \text{Standard Deviation Email Open Rate} / 4\)
Rankings Stage 5, cont.

• Ranking compared to size of the building
• If both rankings are equally scored, but one is twice is large, the larger building targeted first
  – Efficiency
  – Goal of keeping membership
What NEA RI Did

• Starting with the least engaged buildings Uniservs visited the buildings and talked to the members.
• Communicated the message
• Looked to members to give feedback
Going Forward

- Planning on doing this at least twice a year
- Will help drive data capture
What Defines Success?

- Primarily if membership stays greater than 80%
- If a building after engaging gains in the stage 5 metrics
- Ideally continue process so that the most “at risk” building will have better engagement than in year one
What to Avoid

• Should never be a performance evaluation
  – Many reasons why a building may not be engaged
  – Use this information to identify blind spots and not blame staff or leadership

• Not using mathematical metric goals
  – Keep statistics as measurements
  – Avoids the “teach to the test” mentality
Questions? Ideas?
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Session Outcomes

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

– Organizing – a framework for coming up with your own list of targets
– Membership – ideas for reporting that would be helpful to organizing or leadership
– Leadership – explore how to leverage existing data capabilities
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](http://www.nea.org/leadershipdevelopment)