

NEA's Guide to a Successful Member Organizer Program

Table of Contents

Introduction: Why Member Organizers?	2
Stage 1: Identification & Hiring	3
Stage 2: Skills Training & Practice	5
Stage 3: Support, Monitoring, & Accountability	6
Member Organizers in Northwest Arctic, Alaska	7
Appendix A: Ohio Member Ambassador Priorities	8
Appendix B: Alabama Independent Contractor Agreement and Member Organizer Voucher Form	9
Appendix C: Nebraska Agenda for Member Organizer Training	10
Appendix D: Nebraska Overview of Winter Organizing Calendar	10

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:

Lily Eskelsen García, NEA President
Rebecca Pringle, NEA Vice President
Princess R. Moss, NEA Secretary-Treasurer
Kim A. Anderson, NEA Executive Director

NEA Executive Committee:

Eric R. Brown, Illinois
Shelly Moore Krajacic, Wisconsin
Robert Rodriguez, California
Christine Sampson-Clark, New Jersey
George Sheridan, California
Hanna Vaandering, Oregon

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?

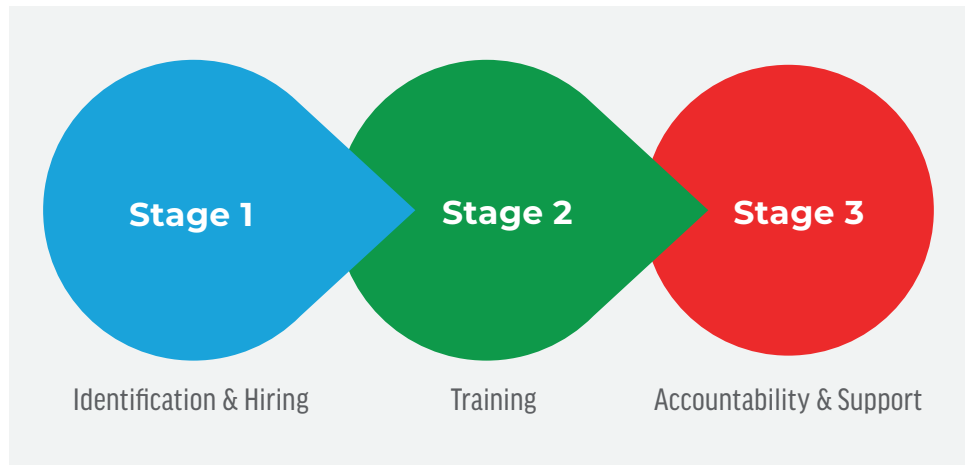
Definition: **Member Organizers** use targeted data to expand the capacity of the local/affiliate to recruit new members and to engage potential members by having one-on-one conversations, but also through other strategic organizing tactics identified by the local or affiliate. Member Organizers are 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 previous site visits, etc. to know who to “tap on the shoulder” to apply.
- ▶ **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.

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 Association rep/building 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.

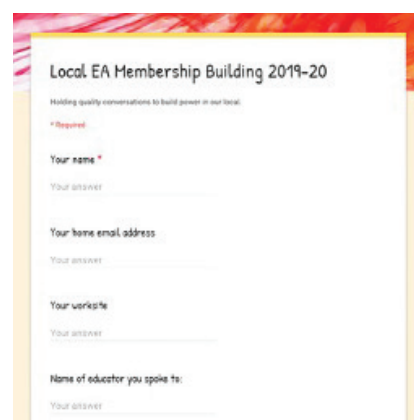
When you planned your program, you chose goals for the overall program (e.g., number of New Ed cards to collect, number of one-on-one conversations with New Employees, percentage of new members recruited, etc.). These goals should translate into individual goals for your Member Organizers to work toward,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



Local EA Membership Building 2019-20

Holding quality conversations to build power in our local.

* Required

Your name *

Your answer

Your home email address

Your answer

Your workplace

Your answer

Name of educator you spoke to:

Your answer

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 workday for the Member Organizers.



Member Organizers in Northwest Arctic, Alaska

Heading into a bargaining year, the Northwest Arctic Education Association and the Northwest Arctic Education Support Professional 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



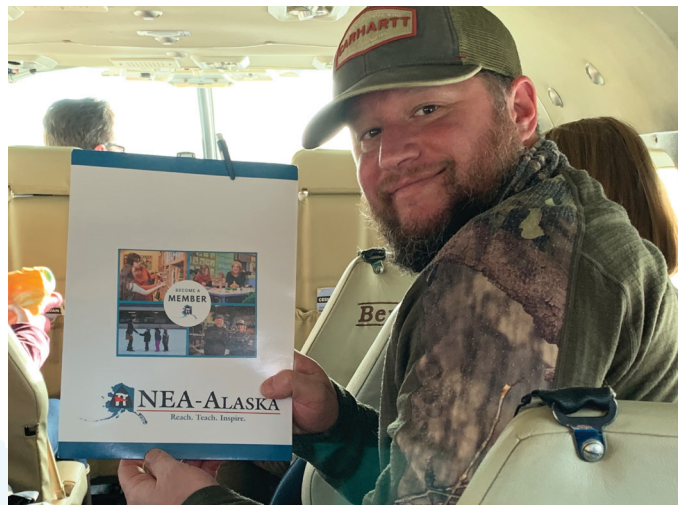
Alaska bush plane waiting for MOs

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).

APPENDIX A:

Ohio Member Ambassador Priorities

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.

Alabama Independent Contractor Agreement and Member Organizer Voucher Form

July 15 to September 30, 2019, Recruitment Period

1. **Independent Contractor.** Subject to the terms and conditions of this Agreement, the AEA hereby engages the Contractor as an independent contractor to perform the services set forth herein, and the Contractor hereby accepts such engagement.

2. **Duties, Terms, and Compensation.** The Contractor's duties, term of engagement, compensation and provisions for payment thereof shall be as set forth in the document which is attached as Exhibit A, which may be amended in writing from time to time, or supplemented with subsequent estimates for services to be rendered by the Contractor and agreed to by the AEA, and which collectively are hereby incorporated by reference.

3. **Written Reports.** The AEA may request that project plans and progress reports be provided by the Contractor on a weekly basis. A final results report shall be due at the conclusion of the project and shall be submitted to the AEA in a confidential written report at such time. The results report shall be in such form and setting forth such information and data as is reasonably requested by the AEA.

4. **Confidentiality.** The Contractor acknowledges that during the engagement they will have access to and become acquainted with various information, records and specifications owned by the AEA and/or used by the AEA in connection with the operation of its business including, without limitation, the AEA's business methods, and member lists. The Contractor agrees that they will not disclose any of the aforesaid, directly or indirectly, or use any of them in any manner, either during the term of this Agreement or at any time thereafter. All files, records, documents, information, letters, notes, media lists, notebooks, and similar items relating to the performance of the contract, and all copies of the same, shall remain the property of the AEA. The Contractor shall retain the exclusive property of the AEA. The Contractor shall not retain any copies of the foregoing without the AEA's prior written permission. Upon the expiration or earlier termination of this Agreement, or whenever requested by the AEA, the Contractor shall immediately deliver to the AEA all such files, records, documents, information, and other items in their possession or under their control. The Contractor further agrees that they will not disclose their retention as an independent contractor or the terms of this Agreement to any person other than the prior written consent of the AEA, and shall at all times preserve the confidential nature of their relationship to the AEA of the services rendered.

5. **Conflicts of Interest; Non-hire Provision.** The Contractor represents that they are free to enter into this Agreement. During the term of this Agreement, the Contractor shall work no more than 20 days without prior approval from the Assistant Executive Director for Field Services. The Contractor is expressly free to perform services for other parties while performing services for the AEA.

6. **Independent Contractor.** This Agreement shall not render the Contractor an employee, partner, agent of, or joint venturer with the AEA for any purpose. The Contractor is and will remain an independent contractor in their relationship to AEA. The AEA shall not be responsible for withholding taxes with respect to the Contractor's compensation hereunder. The Contractor shall have no claim against the AEA hereunder or otherwise for vacation pay, sick leave, retirement benefits, social security, worker's compensation, health or disability benefits, unemployment insurance benefits, or employee benefits of any kind. The Contractor will provide, at their own expense, all equipment, tools and supplies necessary to carry out the obligations required by this Agreement, subject to paragraph 3 above.

7. **Insurance.** The Contractor will carry liability insurance on their vehicle and workman's compensation insurance if required by Alabama law relative to any service they perform for the AEA.

8. **Waiver.** Waiver by one party hereto of breach of any provision of this Agreement by the other shall not operate or be construed as a continuing waiver.

9. **Assignment.** The Contractor is engaged as a professional organizer based upon their professional skills and shall not assign any of their rights under this Agreement or delegate the performance of any of their duties hereunder, without the prior written consent of the AEA.

10. **Modification or Amendment.** No amendment, change or modification of this Agreement shall be valid unless in writing signed by the parties hereto.

11. **Entire Understanding.** This document and any exhibit attached constitutes the entire understanding and agreement of the parties, and any and all prior agreements, understandings, and representations are hereby terminated and canceled in their entirety and are of no further force and effect.

IN WITNESS WHEREOF the undersigned have executed this Agreement as of the day and year first written above. The parties hereto agree that facsimile signatures shall be as effective as if originals.

THE AEA:

THE CONTRACTOR:

Darryl R. Sinkfield
Assistant Executive Director for Field Services

Professional Organizer

Date _____

Date _____

UD#

Page 2



AEA
ALABAMA EDUCATION ASSOCIATION

Alabama Education Association

PROFESSIONAL ORGANIZER VOUCHER

Name: _____ Month: _____ Year: _____

[illegible]

TOTAL DUE ORGANIZER

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





NEW EDUCATOR CAMPAIGN

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