

# CAMPAIGN PLANNING STAGE

## Organizing Model & Template for Integrated Issue-Based Comprehensive Campaigns

CAMPAIGN PLANNING STAGE

CAMPAIGN IMPLEMENTATION STAGE

### Summary

Thoughtful and intentional planning is an integral part of any organizing campaign. Planning is instrumental in determining not only traditional campaign components like demands, timelines, and compression points, but also in considering the campaign's structure, staffing arrangement, and resource allocation.

For local and state integrated issue-based comprehensive campaigns, however, authentic and sincere planning plays a more fundamental role. At its core, campaign planning is an opportunity to build and strengthen relationships, rapport, and trust between various internal stakeholders. It is an opportunity to tackle internal campaign stakeholders' fears and concerns openly, honestly, and with good intentions. It's an opportunity to remind ourselves that we are all on the same team and working towards common goals.

### Important Note

Your affiliate should engage in state and local affiliate planning at a time that works best for your stakeholders. It's important that planning does not prevent your affiliate from engaging in one-on-one conversations with your members and potential members to identify the issues that are most important to them. Campaign planning can take place concurrently with those one-on-one conversations, or after.

# Module 1: Executive Leadership & Affiliate Statewide Campaign Planning

Executive Leadership and Affiliate Statewide Campaign Planning is a critical step in developing and launching a statewide campaign. It's also an opportunity to obtain affiliate staff buy-in.

## Module I Goals:

- Secure leader and staff buy-in
- Lay out organizing model and describe how it relates to increased affiliate membership and winning on issues that matter most to educators
- Develop and commit to supporting a campaign staffing structure



It's important to bring in the affiliate staffers that will help coordinate and support the campaign at targeted locals and between the state affiliate. These staffers will also have a broader understanding of locals to target based on quantitative factors such as potential membership growth and strong worksite structures, as well as qualitative factors such as locals that may be receptive to running an integrated state and local affiliate campaign or program.

## RECOMMENDED MONTH

We suggest convening before the beginning of a new school year. This could be in August but could also be in advance of new fiscal year planning. You can do this whenever your affiliate is ready to convene your local education association stakeholders.

## STATE EDUCATION ASSOCIATION FOCUSED-MEETING

This meeting is about how the state affiliate ensures that local associations, their leaders, and members are authentically integrated into a broader statewide campaign—and how the state affiliate supports local affiliates in their local campaigns, which often results in greater member participation in statewide campaigns. Importantly, it's a time to discuss a possible statewide plan to win and get critical feedback from the affiliate staffers that would coordinate the statewide campaign in targeted locals.

## CAMPAIGN PLANNING ITEMS FOR CONSIDERATION



**Target Locals.** Identify target locals for both membership growth and wins (school board, contract, and priority legislative districts).



**Seasonal Organizing Programs:** New Educator and Early Enrollment.

**New Educator Program.** Are your target locals for this statewide campaign also locals that participated in the New Educator program or are future New Educator program target locals? Consider how local leaders can lead engagement in the statewide campaign through their New Employee Orientations and during the Back to School season. What do local leaders need to drive the statewide campaign at their local? How do these targeted campaign locals incorporate incoming educators into the campaign at the local and state levels?

**Early Enrollment.** April 1 – August 31 is spring Early Enrollment for many affiliates, and many affiliates use the program to increase membership in locals by targeting eligible non-members to join the Association for free. We encourage you to consider how to thoughtfully integrate spring Early Enrollment into your statewide campaign at the local level. It could be targeting eligible non-members to join the Association within the context of the broader statewide campaign and any related organizing at the local level.



**Membership Growth Goals.** Affiliate staffers should help set these goals in partnership with target locals.



**Rationale.** Provide rationale for local targeting, including assessments such as strong worksite structures, committed local leadership, etc. Why are these locals important to winning in the state legislature? Why are these locals important to securing funding for legislation that will be passed?



**State Legislators.** Identify friendly state legislators that will sponsor legislation on various progressive public education issues.



**Issue Identification.** Consider how your state affiliate and its locals identify organizing issues at New Employee Orientations (NEOs) and related new hire events as well as during the rest of the year.

## OUTCOMES OF STATE EDUCATION ASSOCIATION FOCUSED-MEETING

Meeting without tangible results or outcomes can be frustrating for those that allocated time and energy to the meeting. Below are outcomes of the State Education Association Focused-Meeting:

**Target Locals for Statewide Campaign.** What are the target locals for your campaign? Make sure that there is a sound rationale for selecting these locals.

**Concrete, Winnable Demands for the Statewide Campaign.** A statewide campaign demand is not increased membership engagement or more leadership development—these are tactics for winning. They are also not “less testing” or “smaller class sizes.” A revenue campaign should articulate the amount of money being demanded; for instance, “\$995 million in additional funding for K-12 public education.”

**Process.** Your affiliate may not know what its specific, winnable demands should be. Instead of generating demands that are not tied to what members have identified as priorities, determine a process and strategy for identifying those educator priorities.

**Calendar.** Lay out a timeline that includes internal organizing compression points as well as external compression points. Internal compression points are things that we control, such as dates for a membership meeting or building or Association representative training. An external compression point would be something outside of our control, such as a school board election date or testing dates.

## RESOURCES NEEDED

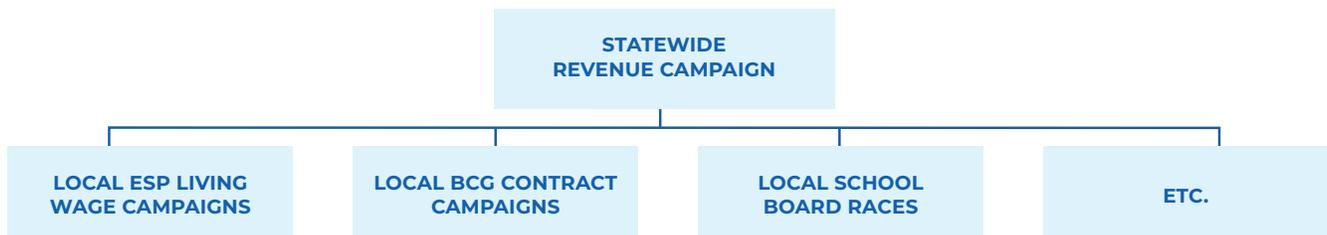
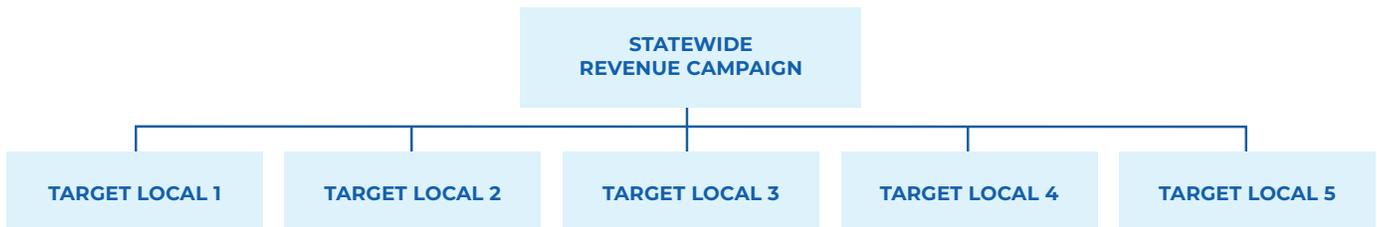
**Statewide Campaign Plan to Win.** Provide a draft of a tentative statewide plan to win (based on this document) for affiliate staff feedback.

**Facilitator(s).** Identify individuals to facilitate the planning session. This may include NEA staffer(s).

**Local Affiliate Profiles.** Develop local affiliate profiles that include organizing, membership, and legislative backgrounds.

**Survey Results.** Provide results from any recent statewide surveys, if available.

**Sample Statewide Affiliate Campaign Model.** Below are two flow charts that model how a statewide campaign focused on securing additional revenue for public education could look.



## Labor Power

To implement an integrated campaign plan successfully, you will also need buy-in from local presidents and local executive committees. You will also need to identify affiliate staffers that will coordinate organizing efforts in targeted locals and between locals and the state affiliate. Consider assembling an Integrated Campaign Staff Team as follows:

### INTEGRATED CAMPAIGN LEADERSHIP: KEY ELECTED STRUCTURES

The Statewide Organizing Campaign Committee (SOCC) will consist of elected decision-makers from the state affiliate and local affiliates. The SOCC must include powerhouse locals that can move other local leaders to authentically engage in the state campaign. It should also include locals situated in districts with key legislators empaneled on committees such as state education budget, appropriations, etc.

### INTEGRATED CAMPAIGN STAFF TEAM: KEY STAFF POSITIONS



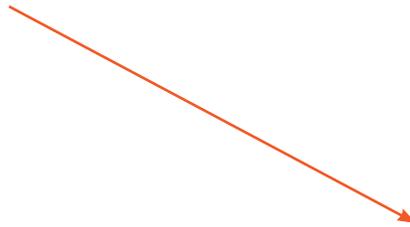
#### **Statewide Campaign Organizing Director (Executive Staffer)**

An executive staffer with positional authority over the other staff assignments listed below who is well respected by both staff and elected leadership. The Statewide Campaign Organizing Director (SCOD) will be responsible for liaising with the SOCC (discussed below).



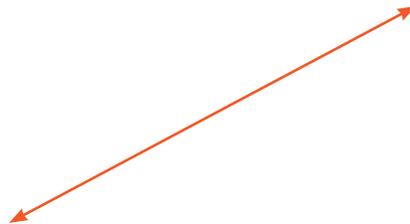
#### **Local Organizing Campaign Coordinators (at targeted districts/locals) (Line Staffers)**

Local Organizing Campaign Coordinators (LOCCs) should be organizers who help local leaders and committees identify local issues to inform the broader statewide campaign. For instance, members in key locals may identify that smaller class sizes are a priority for educators, students, and community members. LOCCs develop localized campaigns to help them win smaller class sizes (such as contract campaigns, school board policies, etc.) but also ensure that these local demands constitute the state affiliate's legislative and funding demands. Importantly, these LOCCs will ensure that local campaign plans include key statewide campaign actions.



#### **Legislative Campaign Manager (Manager)**

An individual with extensive government relations experience, including relationships with key statewide elected officials who sit on important committees. They should also have relationships with key staffers in your state's legislature.



## Module 2: Local Education Association Statewide Campaign Planning

A successful statewide campaign plan to win requires full buy-in from the elected officers of local education associations, and importantly, working together to identify issues that educators and their communities care about the most.

### Module 2 Goals:

- Secure local leader and local staff buy-in
- Lay out organizing model and describe how it relates to increased affiliate membership and winning on issues that matter most to educators
- Commit to supporting a campaign staffing structure



### RECOMMENDED MONTH

We suggest convening before the beginning of a new school year. This could be in August but could also be in advance of new fiscal year planning. You can do this whenever your affiliate is ready to convene your local education association stakeholders.

### LOCAL EDUCATION ASSOCIATION FOCUSED-MEETING

No one likes being left out of the decision-making process, especially when their authentic participation and engagement in the follow-up work is critical to the campaign's success. As a truly democratic union, we attempt to engage key stakeholders from the get-go, ensuring that their voices are heard in the planning process and that the plan to win reflects their priorities and interests. In this case, that's your targeted local education associations.

The state affiliate will likely witness deeper member participation in their statewide organizing, advocacy, and political work if it focuses on issues that members at the local level have identified as priorities. In turn, this can lead to increased membership recruitment and retention. We frequently experience confusion when we are confronted by lower-than-anticipated engagement on state affiliate priorities: why didn't more members attend Lobby Day? Or why did fewer members call their legislator on this important piece of proposed legislation? The answer may be as simple as: "We're not focusing on what members want us to focus on!"

Thus, this campaign step focuses on local education associations and getting their buy-in on what a proposed statewide plan to win should be.

## CAMPAIGN PLANNING ITEMS FOR CONSIDERATION

-  **Timelines.** Set a timeline for the length of time locals will run surveys and related one-on-one conversations.
-  **Training Dates.** Have locals commit to conducting specific rep trainings on using the survey, its importance within the plan to win, and one-on-one trainings, if needed.
-  **Specific Asks to Build Capacity.** Identify and agree upon specific asks that building reps and other worksite leaders will use during one-on-one conversations that help develop internal organizing infrastructure, such as organizing committees, etc. Asks should include:
  - Attend the worksite meeting on survey results
  - Attend the unionwide meeting to discuss survey results
  - Join the union, if not already a member
-  **Check-In Dates.** Locals must commit to checking in on specific dates on Zoom or another video conference system.
-  **Local Membership Growth Goals.** Local leaders and SEA organizers should set membership growth goals.
-  **Internal Organizing Goals.** Local leaders and SEA organizers should set internal organizing goals related to building internal structures, such as committees, getting folks to join committees, etc.
-  **New Educator Program and Early Enrollment.** Invite your local leaders to consider how they would incorporate using the New Educator Program and NEA's Early Enrollment Program into their local organizing that supports the statewide campaign.

## RESOURCES NEEDED

-  **Issue Identification Survey.** Develop surveys to identify and run through locals in preparation for meetings. Make sure that these surveys can be informed and modified by local leadership. We encourage using NEA's Education Policy & Practices Opportunity Checklist, which can be tailored.
-  **Language Accessibility.** Translate surveys into Spanish or other languages as needed.
-  **Building Representative Trainings.** Develop building rep trainings on using the survey in worksites.
-  **Facilitator(s).** Identify individuals to facilitate the planning session, may include NEA staffer(s).
-  **Local Affiliate Profiles.** Develop local affiliate profiles that include organizing, membership, and legislative background.
-  **Survey Results.** Provide results for any recent statewide surveys, if available.
-  **Strategic Research.** Perform strategic research on corporate tax breaks in the state affiliate and in targeted districts. Local leaders need to understand that part of the campaign may focus on how to fund educators' priorities.

## OUTCOMES OF LOCAL EDUCATION ASSOCIATION FOCUSED-MEETING

-  **Organizing Plan & Timeline.** Locals should leave from this planning convening with a clear organizing plan that reflects local organizing priorities as well as statewide campaign priorities.

# Arizona Education Association Campaign Planning Example



## Context

Public education in Arizona remains in crisis. The 2018 Red for Ed strike in the state led to a 20 percent increase in teacher salaries; however, the state remains 49th in the nation in teacher pay despite this increase, and over 1,800 teaching positions in the state are currently unfilled.

## Affiliate Response

To address this crisis, the Arizona Education Association (AEA) engaged in a process of integrated state and local association campaign planning in late 2019 in preparation for a statewide campaign in 2020. The result is the INVESTinED Campaign, a partnership between AEA, Stand for Children, and other allied organizations.

The campaign seeks to pass a new tax surcharge on the affluent in Arizona to provide increased revenue for public education. The surcharge would apply to individuals making over \$250,000 per year and households making more than \$500,000 per year. If passed by voters in November 2020, the measure is estimated to generate \$940 million per year in funding for the state's public schools.

## Lessons Learned

### *Issue-Focused Organizing Leads to Growth*

The Red for Ed campaign in 2018 demonstrated to AEA that the best way to increase association membership was through an issue-based campaign. AEA saw a ten percent increase in net membership after the Red for Ed strike in 2018. While the 2018 campaign saw new activists surface, many local associations struggled to integrate these members and potential members into their building and local union infrastructure.

### *Building Local Structures to Support Local and Statewide Organizing*

AEA wanted to tie its statewide campaign in 2020 to targeted local campaigns with the goal of building more durable local organizing structures, such as Contract Action Teams. They also wanted to synchronize actions of these local campaigns to make the issues of the statewide campaign feel personalized, local, and immediate to educators, parents, and other stakeholders. Their belief was that this would increase the chances of success for the statewide campaign, create lasting organizing structures within locals, and increase membership.

### *Creating Local Affiliate Campaign Culture to Prepare for Local Organizing for Funding*

AEA also hopes to build a campaign-oriented culture within key locals so that, once new state revenue arrives from INVESTinED, those locals will be prepared to secure commitments from local school district governing boards to fund top member priorities such as improved salary schedules, pay increases for ESPs, smaller class sizes, and increased staffing to support student needs (such as nurses, counselors, social workers, and other professionals).

### *NEA's Seasonal Organizing Programs*

AEA used data from 2019 Ed Summer and the 2019 New Educator campaign to determine demonstrated local organizing capacity. This was an important factor in selecting the targeted locals.

## The Plan to Win: State and Local Organizing Components

AEA partnered with NEA's Center for Organizing (C40) My School My Voice team to identify targeted locals and secure additional campaign funding. AEA and C40 identified three key locals that were planning to engage in campaigns during the spring of 2020 for targeted support:

- Chandler, in suburban Phoenix, includes several swing legislative districts that will be targeted by AEA in 2020. The Chandler Education Association (CEA) is engaged in a campaign to defend the district governing board's racial equity policy from attacks by a right-wing group that calls itself "Purple for Parents." CEA is also using its negotiations with the district as an opportunity to raise a set of student-centered issues.
- Sunnyside, in southern Tucson, faces a local budget crisis after the district's voters failed to pass a property tax override question in November 2019. The Sunnyside Education Association (SEA) is building a local civic academy to campaign for increased district funding by raising awareness about corporate tax avoidance strategies employed by large corporations located in the district.
- The Tucson Education Association (TEA) is organizing a local Bargaining Action Team to support a more transparent contract negotiation process in 2020. Through negotiations, TEA is working to significantly increase ESP compensation.

All three locals have set ambitious goals for membership growth, parent and community engagement, and local organizing structure growth.

AEA's plan to win is to align key local campaign compression points with the statewide INVESTinED campaign timeline, such as signature gathering and action around the spring 2020 state legislative session. All three locals were among the state's most productive during signature gathering for a similar proposed revenue measure in 2018. They also cover areas that are critical for boosting "Yes" votes for the INVESTinEd initiative.

## Authentic Partnership Between AEA and its Locals: The Process

AEA conducted multiple rounds of polling and an extensive effort to engage with key stakeholders, including local association leaders, as it planned for the INVESTinEd initiative. The final version of the ballot initiative reflects feedback from these stakeholders and is supported by polling data.

The campaign officially launched in February 2020 and early signs point to significant enthusiasm for the effort from local association leaders.

AEA staff and C40 staff worked with leaders at the targeted locals to develop local campaign plans that both reflect local priorities and align with the state campaign. The result has been a sense that this is "our" campaign, rather than a state association effort that feels like "just one more thing."

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