

# CAMPAIGN PLANNING STAGE

## Identify Priorities & Build Organizing Capacity at the Local Level

CAMPAIGN PLANNING STAGE

CAMPAIGN IMPLEMENTATION STAGE

### Summary

In the Executive Summary and in Part I, we focused on the importance of engaging key campaign stakeholders: elected leaders at the state and local affiliate levels, as well as local and state affiliate staffers.

We also provided users with the Integrated Comprehensive Issue-Based Organizing Campaign model, the Integrated Campaign Cycle, and a sample Integrated Issue-Based Comprehensive Organizing Campaign Plan, where we highlighted the Arizona Education Association's state and local organizing campaign.

In this section, we move from the campaign planning stages to identifying organizing issues with your campaign's targeted local education affiliate(s).

### Starting with Educators & Local Affiliates

It can be alluring to prioritize community organizing and working with community coalition partners and stakeholders. However, we encourage you to start with your dues-paying members to ensure that their voices are being heard and prioritized by their local, state, and national unions.

# Why Identify Issues?



## Membership Recruitment & Retention

Finding the priority issues that matter most to your affiliate's educators, building programs, and campaigns that respond to these priorities gives potential members reasons to join their Association and for existing members to retain their membership.

## Educator Voice

The raison d'être for our local, state, and national affiliates is to ensure that educators' voices are not only heard, but that these voices' collective will is reflected in contract language, school board policy, and state and federal legislation on our priority issues.

These priority issues will vary affiliate by affiliate, but patterns emerge. These issues frequently fall into the following categories:

**Dignity & Respect.** These are traditionally issues related to compensation and benefits, but may also include decision-making at the worksite, school, or district levels, as well as professional development and working conditions.

**Racial & Social Justice.** There are so many issues that fall into this category! A non-exhaustive list includes immigration reform, the school-to-prison pipeline, LGBTQ policies, banning the box, gun control, and climate change.

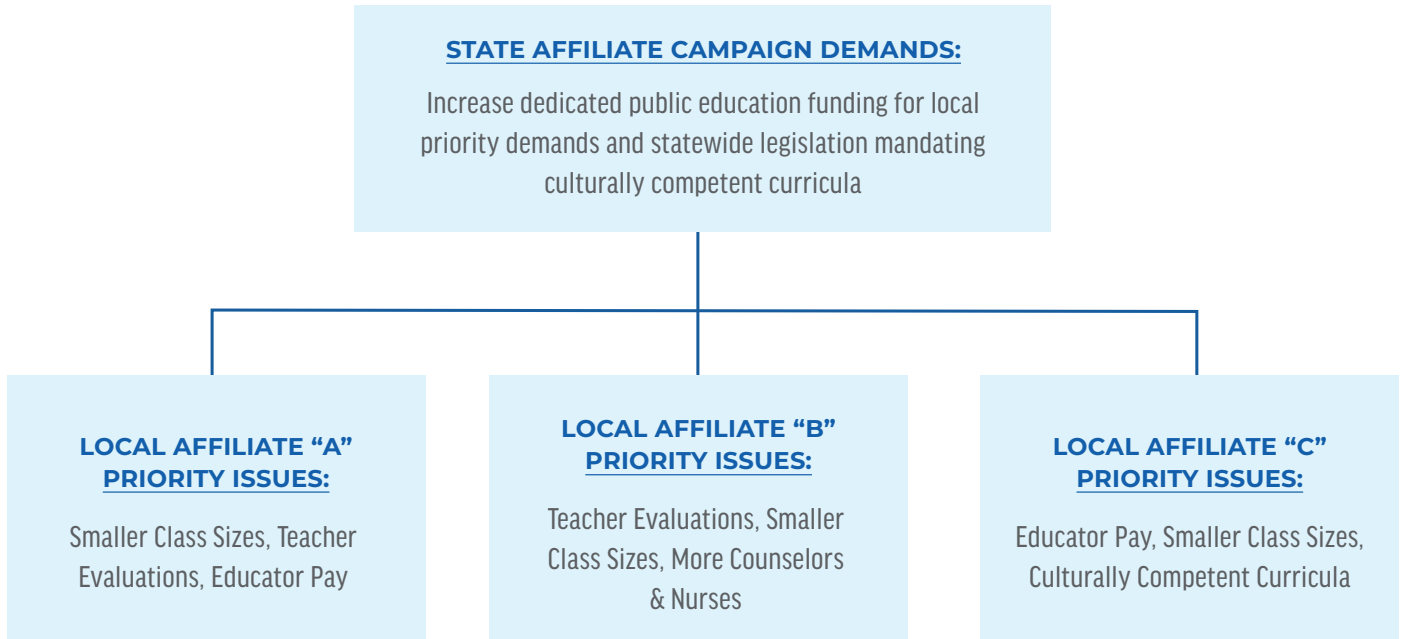
**Student Success.** As educators, our members will always be concerned with the success of their students, both inside and outside of the classroom. Issues related to student success may include smaller class sizes, cultural competency, reduced mandatory testing, increased time for recess, and increased funding for arts and music.



# Identify Priorities & Build Internal Organizing Capacity

We know that a local affiliate's priority issue, such as class size, and its corresponding demand, such as 15:1 educator-to-pupil ratio, can help inform a state affiliate's statewide campaign demands.

The model below helps demonstrate the relationship between local issues and local demands and a state affiliate's statewide campaign demands, which are frequently related to funding these local demands at the local level.



- Identify priority issues at targeted local affiliates by surveying their potential and current members and by conducting one-on-one conversations with them
- Develop internal organizing structures by using the survey or Opportunity Checklist at schools or worksites
- Convene Local Association meeting/forum to discuss results of surveys in more depth

This campaign step focuses on the local affiliate, rather than the state, to ensure that local affiliate members' voices are being heard and that they are being engaged directly through their home local. The state affiliate, however, continues to play an instrumental and central role in supporting the local's leadership efforts to identify these local issues, and importantly, connecting them to why local members will need to engage in statewide organizing campaign efforts down the road.

# Seasonal Organizing Programs

Hint: Your affiliate doesn't need to wait for a specific NEA Center for Organizing Seasonal Organizing Program to begin identifying priority organizing issues. However, we also recognize that it may be easier to identify issues through one-on-one conversations.

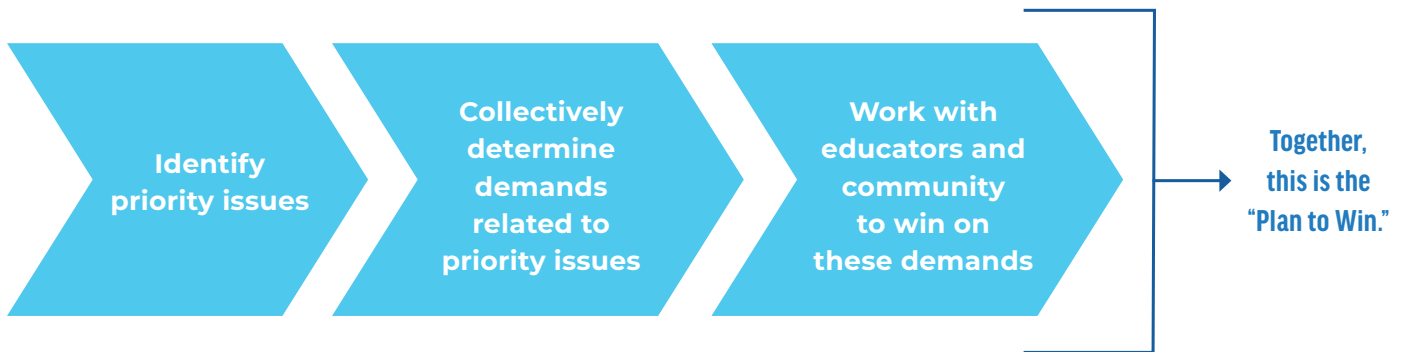
Below is a chart that your affiliate could use when determining the educator constituent you would like to focus on engaging with during a specific NEA Center for Organizing Seasonal Organizing Programs.

NEA CENTER FOR ORGANIZING SEASONAL ORGANIZING PROGRAM	EDUCATOR & NON-EDUCATOR CONSTITUENT	ISSUE IDENTIFICATION & ONE-ON-ONE CONVERSATIONS
<p><b>New Educator Program</b></p>	<p>Suggested Educator Constituent:</p> <ul style="list-style-type: none"> <li>• New educators</li> <li>• Educators new to district/ local affiliate</li> </ul> <p>Suggested Non-Educator Constituent:</p> <ul style="list-style-type: none"> <li>• Parents</li> <li>• Community stakeholders</li> </ul>	<p>It's not impossible to identify specific issues that matter to educators during the Back-to-School season, but we also know how busy this period can be for educators. Many affiliates are also rightly prioritizing the New Educator Program to recruit and listen to new and incoming educators.</p>
<p><b>Winter Organizing</b></p>	<p>Suggested Educator Constituent:</p> <ul style="list-style-type: none"> <li>• Early career educators</li> <li>• Veteran educators</li> </ul> <p>Suggested Non-Educator Constituent:</p> <ul style="list-style-type: none"> <li>• Parents</li> <li>• Community stakeholders</li> </ul>	<p>It's easier to have conversations with educators during the school year—because they're at work! Also, the hectic Back-to-School season has concluded. At this point, new educators may have a better sense of their priority issues—things they would know at a new employee orientation.</p> <p>Don't forget to focus on veteran educators. Not only do they have a nuanced understanding of the issues, they are also frequently the worksite leaders that new and incoming educators rely on for guidance and advice.</p>
<p><b>Spring Early Enrollment</b></p>	<p>Suggested Educator Constituent:</p> <ul style="list-style-type: none"> <li>• Non-members eligible for membership</li> <li>• Early career educators</li> <li>• Veteran educators</li> </ul> <p>Suggested Non-Educator Constituent:</p> <ul style="list-style-type: none"> <li>• Parents</li> <li>• Community stakeholders</li> </ul>	<p>We're still in school and at work during the spring months. There's no reason to stop engaging the broad base of potential and current members, regardless of whether they fall in the early career or veteran educator category.</p> <p>Spring early enrollment reminds us to consider engaging and recruiting non-members eligible for first-time membership. However, membership recruitment efforts during this period should still take place within a campaign context.</p>
<p><b>Education Summer or Summer Organizing</b></p>	<p>Suggested Educator Constituent:</p> <ul style="list-style-type: none"> <li>• Targeted educators</li> </ul> <p>Suggested Non-Educator Constituent:</p> <ul style="list-style-type: none"> <li>• Parents</li> <li>• Community stakeholders</li> </ul>	<p>It's challenging to get to the same number of educators during the summer due to...well, most educators not being at school or their worksite.</p> <p>Summer is a great time to expand conversation and one-on-one conversations to a broader non-educator audience, as well as target educators based upon whether they are worksite leaders or activists, or work at specific worksites important for moving the campaign forward.</p>

# Identifying Issues: Maximizing Issue Identification While Building Internal Organizing Capacity

We already assume by this campaign stage that the local's executive officers and board are "on board," as obtaining their buy-in was the focus of our previous sections.

Here, we focus on developing the campaign calendar with a set of clear actions that we'll need to take to not only train local affiliate elected leaders and worksite leaders, such as building representatives, on how to conduct one-on-one conversations and move an issue identification survey at their worksites (such as the [Opportunity Checklist](#)), but critically, also train them on why the local affiliate is having one-on-one conversations and asking educators to fill out surveys at all.



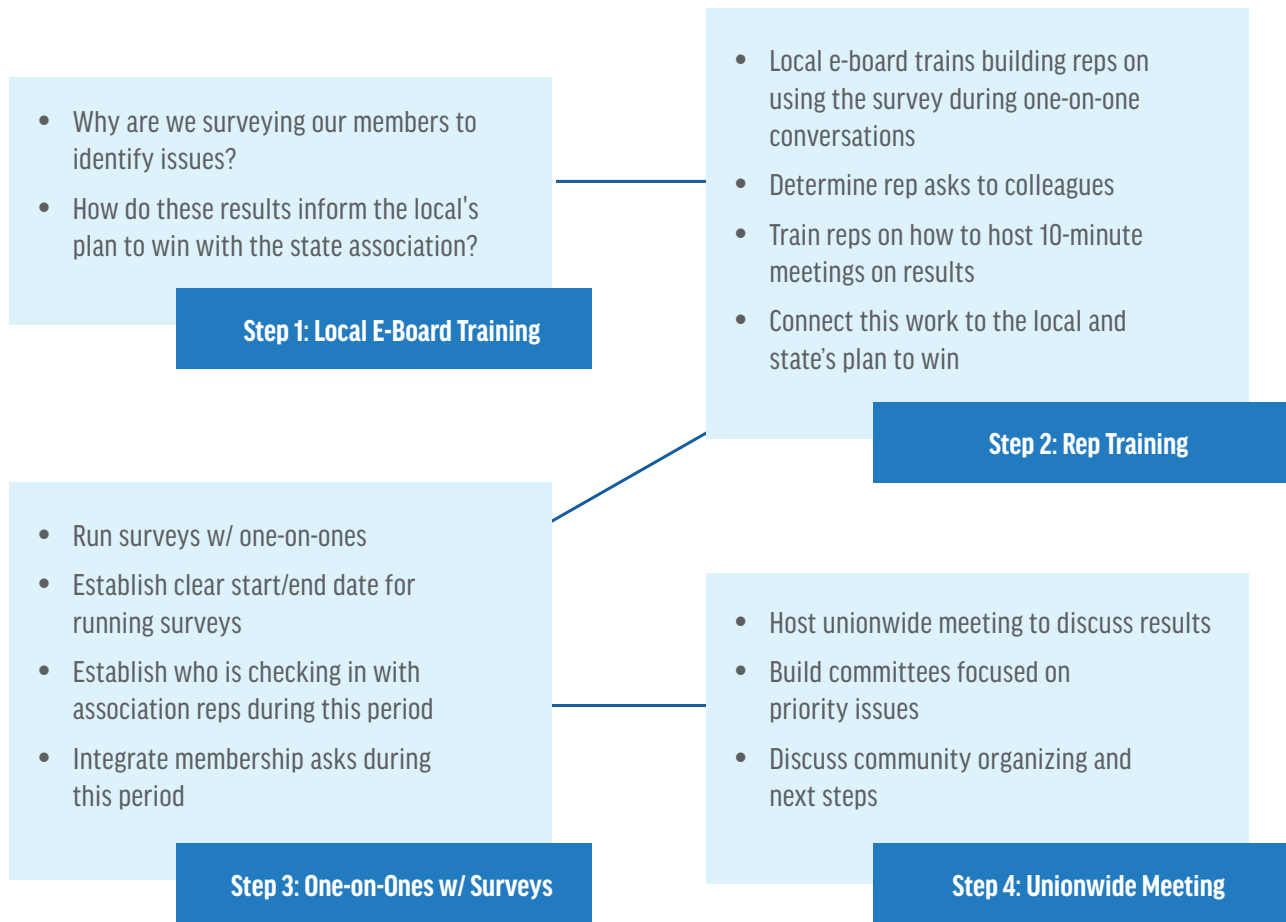
# Key Questions

Many local affiliates may not be familiar with running an integrated issue-based comprehensive campaign, meaning that their members will not necessarily connect that we want to know their priority issues because we then want to work with them to address those issues together.

We need to be able to answer key questions for local affiliate's members, and importantly, we need to educate the local affiliate's member leaders so that they are able to answer these questions themselves.

Possible Questions	Possible Responses
<b>Why is the Association asking me to fill out a survey?</b>	We want to know what we should be focusing on as an Association—and we can't know that unless we talk to you and have information on what you think is a priority. We want to start developing solutions together, and this is the first step toward achieving this.
<b>I filled out the New Ed Campaign interest card a few months ago. Is this related to the New Ed Campaign?</b>	This is related to the New Educator Campaign! The New Ed Campaign was about ensuring that we engaged with new educators and started to understand what they needed. We are following up now that you've been in the classroom for a bit, to check in to see how you're doing, but also to see what you think we need to be collectively focusing on as an Association.
<b>I'm not a member of the Association. Should I be filling this out?</b>	We want to know, regardless of your membership. We also want you to join your Local Association. <i>There's more to it than this to make a membership ask. We'll provide more information below on how to do this.</i>
<b>What will the Association be doing with the results?</b>	We'll be sharing it with you and other educators at your school or worksite—first, at a 10-minute meeting that will take place later this month on this date. Will you join us to be part of that initial discussion? After this, we'll be having a broader, Association-wide meeting to discuss results in the aggregate.
<b>I'm afraid to fill this out—will my principal or the school district find out what I said?</b>	We won't share your specific response, although we may decide as a union to share the responses in aggregate.
<b>Is this related to the Every Student Succeeds Act (ESSA)?</b>	It is! It's all about educator voice.
<b>I'm not really interested in ESSA. Why should I fill this survey out?</b>	This is about ensuring your voice and your concerns are being prioritized by your union and your school district.

# Issue Identification & Building Internal Organizing Capacity Campaign Implementation Calendar



**Building Representatives Trainings.** We need worksite leaders to not only conduct one-on-one conversations with members and non-members to identify issues, but also to understand how identifying issues is part of an overall plan to win.

This training is to ensure that the local affiliate's Association or Building Representatives (AR/BR) understand how to conduct a one-on-one conversation and how to use the issue identification survey to facilitate this conversation. This training should also train ARs or BRs on identifying colleagues that may be able to conduct similar one-on-one conversations with their colleagues and move the issue identification survey. Outcomes include:

- ARs/BRs understand how to have a one-on-one conversation
- ARs/BRs understand the issue identification survey
- ARs/BRs understand how the survey is connected to a broader local and statewide (if applicable) campaign plan
- ARs/BRs understand how to make membership asks to join the union and how to handle obstacles to joining

**Specific Asks to Build Capacity.** Make sure that building representatives and worksite leaders are making specific asks of their colleagues that building reps and other worksite leaders will use during their one-on-one conversations that will help develop internal organizing infrastructure, such as organizing committees, contract action teams, etc.

**Share Survey Results.** Educators are over-surveyed, period. No one wants to take another survey unless they know why they are taking it and how it can help them—and importantly, when they'll get the results. Set a date and share that date with educators for when the local affiliate will convene, share, and discuss results.

## RESOURCES NEEDED:

- ❑ **Issue Identification Surveys.** Surveys should be disseminated by hard copy and electronically. 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.
- ❑ **Survey Results.** Provide survey and results for any recent statewide survey results, if available.
- ❑ **Strategic Research.** Strategic research on corporate tax breaks in the state affiliate and in targeted districts.

## NEA My School, My Voice Contacts

### Center for Organizing (C4O)

**Nathan Allen**, Associate Director of the Local Growth & Strategic Field Opportunities (LGSFO) Team, Center for Organizing, at [nallen@nea.org](mailto:nallen@nea.org).

**Michael Schoettle**, Field Manager, Center for Organizing, at [mschoettle@nea.org](mailto:mschoettle@nea.org).

### Education Policy & Practice (EPP)

**Donna Harris-Aikens**, Senior Director, Education Policy & Practice (EPP), at [dharris-aikens@nea.org](mailto:dharris-aikens@nea.org).

**Elic Senter**, Manager, Education Policy & Practice (EPP), at [esenter@nea.org](mailto:esenter@nea.org).