

Surround Sound Toolbox

Sample six-week plan using Email, SMS, Hustle,
Telephonic Organizing, and Member Organizers

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The Surround Sound Recruitment Funnel

A good Surround Sound strategy reaches your potential members through multiple channels, raising their awareness of the Association and moving them closer to joining.

The Recruitment Funnel below is a tool to help visualize the tactics that build relationships with potential members, not only encouraging them to join, but also making the most of your time on the ground by strategically reaching out to members whom you have identified through digital organizing.

RECRUITMENT

STEP 1: AWARENESS. Introduce value through visible and relevant action.
Tactics: Broadcast email, SMS, digital ads, and events.

STEP 2: ENGAGEMENT. Connect through direct conversation.
Tactics: Hustle/SMS/email outreach, phone calls, and in-person events.

STEP 3: CONVERSION. Transition to membership.
Tactics: In-person meetings and phone conversations.

→ Awareness

Aim to reach the widest possible audience, using broadcast email, SMS, digital ads and newsletters.

→ Engagement

Connect for two-way conversations through personalized Hustle/SMS/email outreach, a phone call, or an in-person chat.

→ Conversion

Build a “likely join” list and have in-person meetings or phone conversations to talk about membership.

Understanding Surround Sound Strategy

Step 1: Awareness

Raising awareness about how states and locals advocate for educators makes organizing more effective. Focus on large-scale broadcasts that reach the maximum audience with minimal effort. Communicating for awareness often uses one-way communication channels to increase brand recognition. Examples of tactics that support awareness include email, SMS, digital ads, and newsletters. Use “low barrier” requests that collect contact information and allow for follow-up, like petitions, event RSVPs, and story collection tools.

Step 2: Engagement

Build the relationship by delivering consistent messaging through *direct* and *personal* communication, whether online or offline. The engagement step focuses on deeper engagements that show the value of the union and invite the potential member into the community. Look for ways to connect that utilize two-way communication so that you can listen, exchange ideas, and build trust. Since engagement is more time intensive, use the funnel strategy to narrow your audience to the hottest leads. Use data to target those who have responded to previous outreach.

Step 3: Conversion

For the final step, narrow your engaged audiences to those likely to join and make the ask! By now, you have created a relationship built on trust. Now it is time to ask for a commitment. Utilize the data you gathered in the last two steps to tailor your ask based on the potential member’s interests.

If a potential member still isn’t ready to join, think about other ways to keep them involved in the community. See if they will join any of your social media groups or text/email lists, agree to attend a future event, or if they will volunteer for a specific action.

TACTICS FOR BUILDING POTENTIAL MEMBER LISTS:

Use “low barrier” requests that allow for follow up and collect contact information.

- Petitions
- Event RSVP forms
- Story collection tools



THINK ABOUT:

- What issues do educators in your area care about?
- How is your Affiliate supporting those issues?
- What tools, resources, or calls-to-action around those topics could you use to start an organizing conversation?
- Are there opportunities to talk to potential members and check in (like natural disasters, controversial legislation, etc.)?

BEST TACTICS FOR THIS STEP:

- Build a “likely join” list and ask them for an individual in-person meeting to talk to them about membership.
- Follow up via text, email, or call.
- Test a telephonic join program with a membership ask.



THINK ABOUT:

- Who are the people making your join asks?
- How are they getting your “likely join” lists, and how often do they talk to them?
- What are their plans for follow up?

Launch Your Surround Sound Campaign

The Surround Sound Checklist

When it comes to Surround Sound, planning ahead saves time and helps secure better outcomes. Luckily, after you set it up once, it is easier next time!

1. Create your target lists

- Take inventory of which potential member lists are currently available in NEA VAN or NEA360:** Before investing in building new lists, make sure you take stock of the lists you already have access to and make sure they're imported through NEA VAN or the data platform of your choice.

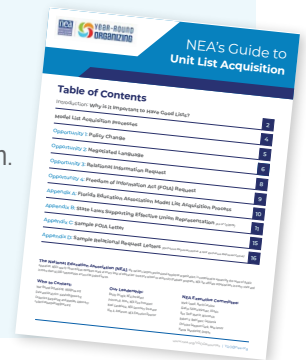
Check for the following lists:

- Potential Member Targets in NEA VAN
 - In the **Targets** section, include **Any** and pick your lists from:
 - YRO: Potential Member Targets
 - YRO: Join Now Abandoned
- Current bargaining unit lists acquired to date
- Potential member data in NEA360
 - YRO Field Leads
 - Join Now Abandoned Applications
- Recent Aspiring Educator alumni
- Recent action takers on petitions or events
- Canceled members, excluding those who left the profession, moved states, retired, or deceased
- Purchased AGILE lists (available in some states)

- Grow your list by identifying new potential members:** Now that you've identified your existing database, think through strategies to reach potential members who are not already on your lists.

Has your affiliate tried:

- Building your potential member list through policy changes, negotiated language, information requests, publicly available data, or FOIA requests?
- Enhancing your data with NEA Database Systems to identify additional contact information on potential members?
- Creating petitions, newsletters, engagement events, or other ways to attract new contacts to your lists? Consider putting ad money behind these acquisition tools for further growth.
- Assess your list acquisition plan using [this worksheet](#).



- Create lists of potential members statewide or in targeted locals:** Using the potential member lists you have built, create targeted custom Facebook audiences to begin serving your digital ads to potential members. Use these lists for email, Hustle, and other digital tactics.

Resources:

- [Data Resources – Data In & Data Out](#)
- [List Acquisition Toolkit](#)
- [List & Data Submission](#)

2. Create campaign goals and plan measurement strategies

- Decide on campaign goals and plan out how you will measure them:** It is important to decide your timeline, metrics of success, and measurement tools before you start your campaign. There is a lot of data you can gather if you prepare ahead.

Think about:

- Am I looking for new potential member targets, or do I want to focus on join conversions for existing targets?
- How do I plan to report back on the campaign? What data will I need?
- How will I measure the success of my tactics? What tracking tools do I have in place?
 - Hint: If set up in advance, [Google Analytics and UTM codes](#) can help you measure traffic to your site. Social media also provides basic metrics on engagement.

3. Get the most out of people and tools

- Website:** Put your organizing at the center of your website. Your website is where you tell the story of your affiliate. From the homepage, any visitor should know what your affiliate is, what you stand for, why they should join, and how to join.

Need help? Check out our [Join Page template for more suggested copy you can use on your state join page.](#)

- Don't forget about [Search Engine Optimization](#)! Think about the ways people might be searching for you on search engines and integrate those keywords into your content. Need help comparing words? Check out the free [Google Trends tool](#).
- Make sure your homepage links easily to your online join systems. Have a join link or button in the navigation, footer, and at least two other places on your homepage.
- Think through other places to highlight join asks—for example, if you have a blog post about a recent union success, think about adding a call-to-action featuring the join link.

- Hustle:** Hustle is a valuable tool for both list cleaning and making a membership ask.

- Use the following VAN integration for any Hustle goals associated with digital ad campaigns:

Configure Integrations

Integration
MyWorkers NEA 3.15 [van]

Destination
VAN Survey Question

Question
YRO Engage

Create Response to VAN Survey Question when...

...initial messages are sent by organizers
Unknown

...Organizers mark members as "No response"
Select...

...Organizers mark members as "Yes"
Yes

...Organizers mark members as "No"
Yes

...reminders are sent by organizers
Select...

Cancel Save

- Define your Hustle goals.

Focus on different Hustle goals based on where your contacts are in the recruitment funnel:

- Goal 1: Relationship Building with Contacts. Good for the awareness and engagement steps. Don't make a direct ask, but build the relationship by showing them the value of union membership. For example: a wellness check, an invitation to an event, sharing a win story, etc. This will both build the relationship and help clean up wrong numbers.
- Goal 2: Direct Membership Ask. Send a direct membership ask text to all contacts. These are best done by local organizers/Member Organizers who already have existing relationships and trust with the audience (i.e., not "cold calling").

Become a Hustle expert: Connect with NEA Senior Digital Strategist Justin Conley at jconley@nea.org. You can also find sample Hustle scripts in the section below!

Email Program: Identify when you want to send emails and who should send them, and get the lists ready in your email platform. Planning emails early can help with turnaround time and staying on schedule.

Petition and Event Platform: If you are planning to organize a petition as part of your campaign, make sure you have a platform to host them on that will capture data, will integrate with other systems, and has been tested for reliability.

Hint: We recommend VAN and EveryAction or Salesforce Marketing Cloud as tools that connect with NEA's data infrastructure.

Telephonic Organizing: The NEA Telephonic Organizing project allows you to recruit new members or PAC donors, deliver telephonic messages, or retrieve information from your organizing units over the phone. NEA has dedicated trained callers ready to dial thousands of numbers a night in support of your work.

In order to participate, talk to your contact in the Center for Organizing and Affiliate Support and set up the calls. We need a list and script, as well as a commitment to follow up with these individuals. Calls are generally free for affiliates. Don't let lack of funds prevent you from participating.

Have questions about how to get started? Contact your Year-Round Organizing staff person at YRO@nea.org. You can also find sample scripts in our [Year-Round Organizing tools folder](#).



























Member Organizers or Activists: Member Organizers are members who work directly with affiliate and national staff to use targeted data to expand the capacity of the local/affiliate to recruit new members and engage potential members. Member Organizers are typically paid for their time and travel, as this work typically occurs outside of the regular workday and at various locations. 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.

Interested in setting up a Member Organizer program? Email YRO@nea.org or check out the resources in www.nea.org/YROResources for more on creating and supporting a Member Organizer program.

A Six-Week Surround Sound Calendar






Goal of this section: To provide a template Surround Sound campaign to help you visualize your six-week campaign.

We've designed a campaign calendar that pulls in the strategies and tactics we've explored so far. While the calendar follows a specific timeline, it is a template that can be used over any six-week period. You can easily replicate this plan by using the copy-and-paste tools we have included in the next section.

Week 1				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Digital Audit	 Prep Member Organizers	 Data Audit	 Plan Telephonic Campaign	 Petition or Survey Launch
Week 2				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Email 1	 Member Organizer Check-In	 Telephonic Join Scripts		 Hustle 1
Week 3				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Email 2	 Telephonic Join 1	 Hustle 2		 Finalize Telephonic Organizing Plan
Week 4				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Event Reminders	 Event	 Pull Data from Survey/Petition/Event	 Report Back to Member Organizers	 Hustle 3
Week 5				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Email 3	 Telephonic Join 2	 Email New Potentials	 Get Data to Field	 Hustle 4
Week 6				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Member Organizer Follow-Up		 Email 4		 Email/Hustle

Week 1

For the first week of your campaign, focus on assessing your plan and gathering your data.

Week 1				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Digital Audit	 Prep Member Organizers	 Data Audit	 Plan Telephonic Campaign	 Petition or Survey Launch

Monday: Digital Audit.

List the digital platforms you want to include in this campaign. Then choose a cadence to use going forward.

We recommend:

- Email (4 throughout the campaign)
- Instagram/Facebook (1+ post per week)
- Twitter (3+ posts per week)
- Hustle (4 messages throughout the campaign)

Also make sure your website prominently features Join Now buttons linking to your interstitial page.

Tuesday: Prep Your Member Organizers.

Let your Member Organizers know that you are planning to launch your campaign. Schedule a check-in for Week 2 and invite them to join.

Wednesday: Data Audit.

What lists do you have access to, and what is their status? What lists do you need to gather, and which lists do you need to clean?

Thursday: Plan Telephonic Campaign.





Plan your Telephonic Join Campaign based on the data you have. Reminder: the NEA can help you identify and collect data you don't have.

Friday: Petition or Survey Launch.

Find an issue your state educators care about and launch a petition or survey around it. You will be able to use this list for future targeting by making sure you ask for their emails and cell phone numbers.

Week 2

This week you want to feature the petition to make your affiliate relevant and visible.

Week 2				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Email 1	 Member Organizer Check-In	 Telephonic Join Scripts		 Hustle 1

Monday: Email 1.

Send a version of Email 1 (included in the next section) focusing on introducing yourself and the petition or survey you want potential educators to fill out.

Tuesday: Member Organizer Check-In.

Meet with Member Organizers and discuss the strategy around your petition/survey and equip them to join you for the first Hustle. Invite them to the event occurring during Week 3.

Wednesday: Telephonic Join Scripts.





Work with the Telephonic Join team to write your scripts for calls 1 and 2.

Thursday – Friday: Hustle 1.

Send a version of Hustle 1 (included in the next section) to your existing lists. This will help clean your lists and start engaging potential members.

Week 3

Plan a public-facing event on a topic related to your petition or survey to be held during Week 4. Include your affiliate leadership, at least one existing member, and ideally someone from local or state government. Use this week to promote that event.

Week 3				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Email 2	 Telephonic Join 1	 Hustle 2		 Finalize Telephonic Organizing Plan

- Monday: Email 2.**
Send a version of Email 2 (included in the next section) focusing on inviting people to your public-facing event.






- Tuesday: Telephonic Join 1.**
Call a list of potential Member Organizers to invite them to the upcoming event.

- Wednesday: Hustle 2.**
Send a version of Hustle 2 (included in the next section) focusing on inviting people to your public-facing event. Make sure you continue to update your data as you go so that these help to clean your lists.

- Friday: Finalize Telephonic Organizing Plan.**
Finalize your telephonic organizing plan and send all data to the call center.

Week 4

This week will focus on the event and following up with new contacts found through the survey/petition and the event.

Week 4				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Event Reminders	 Event	 Pull Data from Survey/Petition/Event	 Report Back to Member Organizers	 Hustle 3

Monday: Event Reminders.

Text Member Organizers to remind them about the upcoming event. Send an email to all registrants to make it clear how to join.

Tuesday: Event.

Host your event in-person or remotely. Make sure it is open to the public and recorded for future viewers.

Wednesday: Pull Data from Survey/Petition/Event.

Take the names from your survey/petition and everyone who RSVP'd to your event and create an updated phone and email "hot list."

Thursday: Report Back to Member Organizers

Let Member Organizers know how the event went and let them know about the upcoming Hustle.

Friday: Analyze Preliminary Data.


Work with the telephonic organizing team to analyze preliminary data. Think through ways to get the data out to field leads, Member Organizers, and others.

Friday: Hustle 3.

Send a version of Hustle 3 (included in the next section) to both your existing Hustle lists and the new numbers you gathered from the survey/petition/event. Share a resource and make a soft join ask.

Week 5




Messaging should start to shift from background relationship-building to harder join asks.

Week 5				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Email 3	 Telephonic Join 2	 Email New Potentials	 Get Data to Field	 Hustle 4

- Monday: Email 3.**
Send a version of Email 3 (included in the next section) to both your existing email lists and the new emails you gathered from the survey/petition/event. You can include the recording of the event or another resource, but the join request should be the focus.
- Tuesday: Telephonic Join 2.**
Check in with potential members who attended the event. Make a hard ask to join the union.
- Wednesday: Email Targeting New Potentials List.**
Pull any additional contacts from the survey/petition. Copy can be similar to Email 3 since these will be new contacts.
- Thursday: Get Data to Field.**
Get all data from Telephonic Join out to field for follow-up.
- Friday: Hustle 4.**
Add any additional numbers gathered from the survey/petition to the existing Hustle lists. This message should include a hard ask to join.

Week 6

This week focuses on wrapping up the petition/survey campaign and making additional join asks.

Week 6				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 Member Organizer Follow-Up		 Email 4		 Email/Hustle

Monday: Member Organizer Follow-Up.

Ask Member Organizers to reach out individually to potential members on the “hot lists” in their district. They can conduct school visits or ask them to coffee. These conversations should include an ask to join.

Wednesday: Email 4.

Send a version of Email 4, focusing on a hard join ask. Email should be sent to all lists.

Friday: Email/Hustle.

Send a final Hustle/email message to all lists (including any additional survey/petition contacts) discussing the results and actions from the petition/survey and pushing people to join.

Crafting Your Organizing Message

The National Education Association has done intensive research on the messaging that moves potential members to join. In short, the research shows that:

- We must do more to educate potential members that NEA and its affiliates are “unions”—and that unions are legal. And further, to show how the union advocates (meeting with legislators from both parties).
- A transformational pitch, rather than a transactional approach, can significantly boost interest in joining the union. This means focusing on ways they can work together with the union to create change, rather than on immediate benefits received upon signing up.
- When speaking with potential members, an amicable tone works better than a confrontational tone for most of our targets.
- We need to convince potential members that NEA’s affiliates will “strengthen their voice” and “improve their daily lives,” especially by improving wages and addressing workload issues.
- Using past wins to demonstrate potential for future wins is critical—even small improvements on salary and day-to-day issues like facility repairs can go a long way.

Transformational Organizing Conversations

Step 1: Awareness

Conversations during the awareness phase focus on an introduction to the union and its benefits.

Messaging:

[STATE AFFILIATE] is a union for educators in our area, which means together, we have a legally protected right to negotiate (alt: join, and we regularly advocate) for higher salaries and improved working conditions. We meet regularly with lawmakers from both parties to increase support for public education and improve the daily lives of educators so that we can give students our best.

Why it works:

<input type="checkbox"/> Positions the speaker as a collaborator using “we,” “together,” and “our” language	<input type="checkbox"/> Clarifies unions are legal and/or active	<input type="checkbox"/> Is bipartisan	<input type="checkbox"/> Talks about their daily lives
A transformational vision of the union that works with educators to solve day-to-day problems is more appealing than a transactional one that positions the union as fighting on their behalf.	Only 53% of potential members, including only 50% of persuadables, even know a union exists for them. Awareness is especially low in non-CB states (59% unaware) but even in CB states, one third (33%) are unaware there is a union they can join.	Roughly one-third of potential members worry the union is too partisan. Saying upfront that we meet regularly with both parties helps to diffuse this concern before it is even raised. 73% of potential members say they would believe a union that meets with lawmakers from both parties is powerful. This is the most effective proof point.	Regressions show that believing their state affiliate could improve their daily life is highly correlated with joining. Right now, only 29% of potential members say their state affiliate “could improve [their] daily life.” We must change that.

Step 2: Engagement

Conversations during the engagement stage focus on defining the value of union membership in a way that addresses the specific concerns of potential members.

Messaging:

I love teaching and helping my students grow, but there are some issues with my job that used to feel like they were simply out of my control. When we bring these up on our own, we're often told that's just the way things are and ignored.

But when you join with the XX% of educators here in [state/district] who are already members of [state affiliate] [Alternatively if low local numbers: "...the largest employee organization and labor union in the country"], that lets us band together to give all of us a stronger voice so that we can actually be heard, get those issues addressed, and improve our daily lives.

Why it works:

<input type="checkbox"/> References shared values and repeats their language	<input type="checkbox"/> Focuses on a stronger voice	<input type="checkbox"/> Shows power in numbers
Qualitative research shows teachers are generally optimistic and collaborative but feel issues are "out of their control." Showing we understand and share those values/concerns builds trust.	<ul style="list-style-type: none"> • Believing their state Association "gives educators like me a stronger voice" is highly correlated with willingness to join. • After reading a series of statements, potential members latch onto the phrase "having a voice," saying this is one of the most convincing reasons to join. 	<ul style="list-style-type: none"> • Potential members know that strength comes from numbers and are more willing to join when others do as well. • Roughly two-thirds of potential members say a union is powerful when it has over 70% of educators in their state.

Step 3: Conversion

Conversations at the conversion stage show how being a member delivers results for members and benefits public education. It focuses on the transformative nature of membership to assist with the transactional decision around payment.

Messaging:

Most people become educators to help kids. We're not expecting to get rich, but far too often, our work is undervalued. It takes a toll on far too many educators and that, in turn, makes it harder to do our best for our students.

Banding together is the best way to ensure that educators are paid what we deserve. [State affiliate] has already successfully secured some increases in salaries and wages. Educators deserve more, but it's a start. With more members like you, we'll have an even stronger voice and be able to accomplish so much more to improve our daily lives to help us give students our best... [AS NEEDED: ...like securing real pay increases and cost of living adjustments, winning dedicated planning time for teachers, protecting teachers from mandates for additional work on nights and weekends, and hiring more staff to reduce class sizes so that educators can wake up each morning with the tools to connect with our students and do our best.]

Why it works:

<input type="checkbox"/> Demonstrates real results while acknowledging it's not enough	<input type="checkbox"/> Shows we share their goals and understand why they teach	<input type="checkbox"/> Name checks top priorities
Even after being presented with a series of messages in favor of joining, prospective members are clear: they need to see results, ideally in their area of the country, and know we are working toward even more.	In qualitative, potential members stressed that unions should not help educators at the expense of students. They should help educators so that educators have the bandwidth to help their students.	<ul style="list-style-type: none"> • Winning higher salaries is far and away the top priority for persuadable potential members. • Winning dedicated planning time and protecting teachers from mandates for additional work follow close behind.

These insights were used to develop a communications campaign and collateral, such as flyers, leave-behind brochures, and a conversation guide for Member Organizers. These can be used during in-person events like New Hire Orientations, during one-on-one organizing conversations, or through your digital networks. [Download those resources here.](#)

Copy-and-Paste: Tools Created for Your Join Now Campaign

Match these tactics to the schedule in the six-week Surround Sound calendar. You can copy and paste or customize to meet your needs. Want more templates? We have developed organization conversation starters on [unions](#), [pensions](#), [health care](#), and [student debt](#).

Graphics and Video

[Download graphics and videos here](#). We have them customized for your state affiliate or you can edit them from the templates folder. Feel free to utilize these graphics in your communication strategies!



Email

We recommend sending a series of email messages to your potential member lists. These emails will walk them through the relationship journey and help prime them for the Join Now action.

Email 1 – Introduction

This email should introduce you, the union, and why you are emailing them. Include a join ask but focus on the relationship as the priority. If you have a survey or other form of engagement, that can be useful here as well.

Dear _____,

When educators are heard, respected, and given the resources we need, we can give students our very best. As part of the [SEA/LEA], we work together to ensure that educators like you have a stronger voice.

- *We regularly advocate for higher salaries and improved working conditions.*
- *We meet with lawmakers from both political parties to make sure our voices are being heard and respected.*
- *We work hand in hand with school administrators and school boards to improve our daily lives as educators.*
- *We make sure that educators have the resources we need to give students our best.*

Interested in joining? [By signing up here] you'll gain free access to monthly resources for your career, as well as opportunities to get involved with [SEA/LEA].

We cannot thank you enough for all you do, and all you will do, to change the lives of your students. Please let me know if you have any questions about [SEA/LEA], or how you can get involved.

In solidarity,

FIRSTNAME

[JOIN NOW BUTTON]

Email 2 – Webinars or Other Materials

This email will focus on showing some of the benefits of being part of the union, whether it is professional development, a recent big win, or information about educator rights. A join ask should be included, but the resources should be the priority.

Dear _____,

Hi again, it's *FIRSTNAME* from [SEA/LEA]! Your union is here to help you get the training, tools, and community support you need to engage students, advance education justice, and excel in your profession. Check out some of our resources below:

- [Join our event about educator rights]
- [Take action with educators across the state]
- [Connect with us for other forms of support]

Joining [SEA/LEA] connects you with a movement of educators supporting each other. I'd love to talk to you more about our union and what we can achieve together. Are you free for a quick chat sometime this month?

Best,

FIRSTNAME

[JOIN NOW BUTTON]

Email 3 – Join Ask 1

The join ask emails should focus on the ask to join. Avoid watering down that message with other links, though offering a format for further discussion or answering questions is recommended.

[SEA/LEA] educators deliver real change. We meet with school administrators and lawmakers from both political parties to make sure our voices are being heard and respected.

I'm reaching out again with an invitation: [Join your union, [SEA/LEA] today].

By banding together, [SEA/LEA] members impact meaningful change for educators and our students. Together, we have successfully raised educator wages, improved working conditions, supported student loan forgiveness, and made sure the voices of educators are actually heard.

With more members like you, we will have an even stronger voice to impact meaningful change for the lives of educators and their students. Will you join us?

[JOIN SEA/LEA]

Together we are stronger. Together we are heard. If you are interested in the union, but are unsure about joining, I would love to connect and answer any questions you have.

Best,

FIRSTNAME

[JOIN NOW BUTTON]

Email 4 – Join Ask Non-Responders

Send this email only to people who did not join after the first join request. It should be framed as a follow up to the last email, with you not wanting them to miss this opportunity.

Dear _____,

I hope the school year is going well! I know this is a busy time for you, so I wanted to check in and make sure you saw my message about joining [SEA/LEA].

When you join the [SEA/LEA], you join thousands of educators just like us across the state and millions of educators across the country to accomplish things one teacher, one bus driver, one janitor, or even one district can't.

[ADD YOUR VOICE]

When we speak up as part of our local union, we can advocate for significant changes, like increased salaries or improved healthcare benefits—things that improve our daily lives.

Let me know if you would like to connect and talk further about being part of [SEA/LEA].

Wishing you the best,

FIRSTNAME

[JOIN NOW BUTTON]

Social Media

Social media coverage will focus more on adding additional Join Now touchpoints than the full relationship journey. Messaging should be urgent, to the point, and focus on the top reasons to join.



Facebook

[SEA/LEA] educators deliver real change. We meet with school administrators and lawmakers from both political parties to make sure our voices are being heard and respected. Join us: [SEA JOIN LINK]



Twitter

- Together we're stronger. Together we're heard. With more members like you, [SEA/LEA] educators will have an even stronger voice to improve our daily lives and the lives of our students: [SEA JOIN LINK]
- When we speak up as part of our union, we have the power to impact meaningful change for the lives of educators and their students. Add your voice today: [SEA JOIN LINK]
- Together we can accomplish things one educator, one bus driver, one janitor, or even one district can't. Join our union to help us win changes that improve our daily lives. [SEA JOIN LINK]



Instagram

By banding together, our members impact meaningful change for educators and students. Together, we have successfully raised educator wages, improved working conditions, supported student loan forgiveness, and made sure the voices of educators are actually heard. Click on the link in our bio to learn about joining our union.

Hustle

Below you will find some sample scripts to help you build relationships with members and potential members through Hustle. Ideally, this would be a weeks-long engagement, beginning with general check ins, moving to resource sharing that demonstrates what the association is doing to support educators, and then asking potential members to join.

General Script Best Practices

- Keep messages under characters
- Never put a link in the first message, only after someone replies (or carriers will mark your message as spam and never deliver it!)
- Be conversational, don't use Hustle like an email
- Use emojis
- If people need real crisis counseling, direct them to text HOME to 741741 to connect with a Crisis Counselor at the Crisis Text Line
- It's best to keep agents consistent (assigned) rather than first come first serve to establish a real connection with people instead of shuffling them between agents

Phase 1 – Introduction

Use the first round of messages to introduce yourself and why you are reaching out to them. The yes responses would then point to a link on your website with resources, or to a form built to gather data, needs and questions related to a local organizing issue, with follow up assigned as appropriate. No responses would share similar content.

- Hey MEMBERNAME, it's ORGANIZERNAME w/[SEA/LEA] here. I am checking in with fellow educators—how are you doing? We're here for you!
- Hey FIRSTNAME, this is FIRSTNAME w/[SEA/LEA]. We're here to support you throughout the school year. Have you seen our resources for educators yet?
- Hi FIRSTNAME, it's FIRSTNAME w/[SEA/LEA]. Checking in to see how you're feeling about the school year so far—is there anything we can help you with?

Phase 2 – Webinars or Other Materials

If your affiliate has been hosting webinars or town halls, Hustle is a great way to invite active and potential members to join or send recordings afterward. You can replace webinars with a virtual meeting, related resources, or even a news story.

The goal here is to highlight what the association is doing to support educators right now and show the value of membership. The yes response script would thank the contact for being engaged and share the link to refer back to. The no script would share the link and remind them we're always here.

- Hi FIRSTNAME, it's me again! Thanks for joining our meeting this week. I was wondering if you would like to connect more on the value of membership.
- Hi FIRSTNAME—it's FIRSTNAME again! Were you able to join our event this week? What did you think?
- Hi FIRSTNAME, FIRSTNAME from [SEA/LEA] again! Were you able to check out the resources I sent you? Were they helpful?

Phase 3 – Join Ask 1

This is when we shift focus to messaging potential members and asking them to join, ideally after we've checked in and shared resources to directly support educators. The yes response script would include a link to joining online or a link to interest form that would be used for phone follow up. The no response scripts should acknowledge the stressful times and point them to a link to learn more about membership.

- Hi again FIRSTNAME! Together our voices are stronger. Will you join [SEA/LEA] to make sure educators are heard?
- Hi FIRSTNAME, it's me again. With more members like you, our union is stronger. Do you have any questions about membership?
- Hey FIRSTNAME! Your educator community is here for you now and throughout the school year. Are you ready to join us officially?

Phase 4 – Join Ask Non-Responders

One more time to folks who didn't respond yes or no to the first join ask.

- Hey again FIRSTNAME! We're doing everything we can to advocate for fellow educators. Will you join us? Or do you have any questions about membership?
- Hey FIRSTNAME, hope you're doing well. Our community has really come together, and we couldn't be prouder. Are you ready to join us?
- Hey FIRSTNAME, it's me again :) Do you have questions about joining [SEA/LEA]? Together we're delivering real change for students and educators.

Contact Us

We want to hear from you! Let us know if you have any questions about your digital plan strategy or if you would like a brainstorm session with our team. We're always here to help.

Did you implement this plan? Let us know how it went! We'd love to share successes or learn from any challenges you face.

Digital strategy: Connect with NEA Senior Digital Strategist Annie Rosenthal at arosenthal@nea.org.

Telephonic join: Contact NEA Organizational Specialist Jonas Barriere at jbarriere@nea.org.

Member Organizer Program: Connect with the Year-Round Organizing Campaign at yro@nea.org.

Messaging guidance: Connect with NEA Senior Communications Strategist Brian Washington at bwashington@nea.org.

Hustle and EveryAction strategy: Connect with NEA Senior Digital Strategist Justin Conley at jconley@nea.org.

Data General Support and VAN: Connect with data support at toolsupport@nea.org.

