

# NEA's Guide to EARLY ENROLLMENT

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**The National Education Association (NEA)**, the nation's largest professional employee organization, is committed to advancing the cause of public education. NEA's 3 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.



# An Introduction to the Early Enrollment Campaign

The Early Enrollment campaign is a state-based initiative that invites potential members to experience the transformative impact of being a part of the union for no immediate cost. From April 1<sup>st</sup> to August 31<sup>st</sup>, educators can join the union without paying dues until the new school year starts.

Contact your state affiliate to ensure their participation in the Early Enrollment campaign.

## Why Early Enrollment?

The **Early Enrollment campaign** is designed to support the growth of affiliate membership by maximizing local organizing. In addition to gaining access to the professional learning resources and everyday benefits offered by the union, potential members will experience the power of their union to create positive change for their students, communities, and profession.

## How to Use This Guide

This guide provides users with strategies and a few best practices for launching an Early Enrollment campaign.



*The NEA Early Enrollment campaign is an important part of our affiliate's year-round organizing plan. It sets us up for success at the start of the membership year.*

**William Spiegel**

UniServ Specialist  
Utah Education Association



## Phone a Friend

Contact Kavita Rangarajan at [krangarajan@nea.org](mailto:krangarajan@nea.org) and Aaron Muhammad at [amuhammad@nea.org](mailto:amuhammad@nea.org) for Early Enrollment policy questions. Contact Caitlin Rollo at [crolo@nea.org](mailto:crolo@nea.org) for campaign-related questions.

# Objective 1: Plan at the State & Local Level

**1 Have a pre-campaign planning meeting at the state and local level.** Key state affiliate staff and local leaders should set up a meeting to discuss the plan.

**2 Set campaign goals.** Develop a strategy, a detailed plan, and benchmarks for the campaign. Campaign goals should include list acquisition and cleansing, new members recruited, one-on-one conversations, and increasing the number of worksite leaders and activists. Numeric goals should be the benchmark when writing your Early Enrollment organizing plan.

**3 Dedicate the resources.** Local associations must be willing to treat organizing as a priority. The most important resources to dedicate to this campaign are the time and effort of building representatives, local leaders, and staff. In addition, funds may be needed for site visits, house visits, actions, and new hire orientations.

**4 Time your campaign.** It's important to time your campaign with important events and activities such as contract negotiations, issue campaigns, etc.

**5 Schedule weekly debriefs.** Debriefs with your Early Enrollment team are essential to help guide them through difficult conversations or address new issues that have arisen.



## Best Practices for Planning

### Utah Education Association

During the Early Enrollment period, the Utah Education Association learned it was essential to have a field staffer lead the campaign and partner with locals for strategic planning. It was important for the success of the Early Enrollment campaign that the field lead, UniServ Directors, and local leadership worked together to set numeric goals. The Utah Education Association utilized a database to track the local's goals. The state staff would do a monthly membership report-out with participating locals in order to track progress toward goals.

## Objective 2: Identify a Local Team

1. Current local leaders must take **responsibility** for the campaign. Consider getting building representatives, local presidents, and executive board members to **commit** to the strategy and benchmarks of the campaign.
2. **Identify** and **secure** member leaders, Local and State staff who will lead and drive your Early Enrollment campaign forward.
3. At the local level, utilize potential membership lists to identify and **target** worksites with the potential to increase membership. Also, assess if you have existing leaders at your targeted worksites.

### Here are some questions to guide the leadership assessment process:

- Are they respected and liked by colleagues?
- Are they effective on the job?
- How large is their social network?
- Are they willing to commit time?
- Can they effectively communicate?
- Do they have followers they can move to take action?

## Suggested Local Roles

**Campaign Lead:** Support the organizing committee by establishing a strategic plan, coordinating trainings and events, gathering and compiling organizing data, and supporting stakeholders throughout the campaign.

**Organizing Committee Members:** Execute recruiting visits in coordination with worksite leaders, build a calendar of scheduled worksite visits and events, compile data gathered from each worksite visit and union event, help coordinate trainings necessary to successfully execute the campaign plan.

**Worksite Leaders:** Work with members of the organizing committee to schedule visits, flyer mailboxes, get the word out ahead of worksite visits, and recruit potential members. During a worksite visit, worksite leaders should introduce their coworkers to the organizing committee members present and encourage meaningful one-on-one conversations.

**Member Organizers:** Identify members who are willing to be Member Organizers (MOs). Member Organizers are responsible for engaging potential members and current members. When members themselves speak about how their local makes a difference in their work, community, and personal lives, they are an influential force in building power in the union.

# Objective 3: Train Your Member Organizers

- 1. Identify Member Organizers.** Develop a local process to maximize Member Organizer Diversity. Member Organizers will give your local the ability to expand capacity to recruit and engage members in the union. It's always important to communicate the process for hiring or joining the team to the potential pool of Member Organizers.
- 2. Have clear expectations.** Provide Member Organizers with a written set of expectations and include schedules (for training, debriefs, check-ins), data collection requirements, a code of conduct, a dress code, a confidentiality agreement, and rules on sharing information.
- 3. Develop a training plan.** Schedule a training with time to practice. Trainings should model what you want Member Organizers to do. The Member Organizer trainings should include reporting tools (including technology) and one-on-one sessions because successful campaigns must communicate a clear, concise, and relevant message and be able to track benchmarks.  
*Resource: For additional training ideas, here is a link to [Secrets of a Successful Organizer Handbook](#).*
- 4. Mentor and support your Member Organizers.** While training your new Member Organizers, pair them with staff or seasoned Member Organizers.
- 5. Set program goals and communicate them.** For a benchmark or goal to become important, it must be communicated to the team. Examples of goals or “deliverables” would be the number of one-on-ones per week, the number of recruits and timelines by team or individual, and the number of hours per week expected. Schedule check-ins and data reviews. Have a plan to use the data collected.

## Best Practices

The Teacher Association of Baltimore County (TABCO), which is a local affiliate of the Maryland State Education Association, found success during Early Enrollment by working during the summer to identify existing issues of importance to members. The TABCO team recruited a Contract Action Team (CAT) member in **175 worksites** and identified **20 Member Organizers** over the summer to identify potential CAT members in all of our worksites and to sign them up to be CAT members through one-on-one conversations with building leaders. Each Member Organizer had one-on-one conversations with building representatives, active members, and natural leaders. TABCO was able to identify at least one CAT per worksite to be the contract liaison to the negotiations committee during contract negotiations. The organizing work resulted in the Member Organizers recruiting **624 leaders** and a total of **52 Contract Action Team Members**. The Member Organizers made over **1,000 calls**, connected with **692 contacts**, and had **91 one-on-one face-to-face conversations**. The local experienced a membership increase from the previous year, with **327 new members** during the Early Enrollment period, compared to the previous year with 81 new member recruits.



**175** Worksites



**20** Member Organizers



**624** Leaders



**52** Contract Action Team Members



**692** Contacts



**91** One-on-One Conversations



**327** New Members

# Objective 4: Build a Potential Member List

- 1. Membership data integrity.** Make sure you have proof of membership for everyone in the unit, and that this agrees with the NEA membership database. If your local has access to the membership database, update or submit membership files once per month to the State Affiliate to update local information.
- 2. Policy change.** Work to pass state legislation or secure administrative/executive action at the state level, or at the local level through school board policy changes or local ordinances. Negotiate contract language to get the new hire list from the district. The union can negotiate language that requires the school district to provide the union with employee contact information in regular intervals. Ideally, language should also guarantee that the union can use bulletin boards, staff mailboxes, email, or other means to maintain a consistent and ongoing presence in members' lives.
- 3. Reach out to your district for a new hire list.** Request the broadest possible data on members, including (when legal) home and worksite addresses, date of hire, and job title. For additional resources and guidance on List Acquisition Strategies, check the [Year-Round Organizing List Acquisition Toolkit](#). To get access to the YRO Resources site, contact NEA at [yro@nea.org](mailto:yro@nea.org).
- 4. Use Potential Member Lists available in VAN.** Several lists of potential members are available as Targets using VAN. These include contacts from the Year-Round Organizing Campaign, Aspiring Educator Alumni, and potential members who have recently engaged with NEA and our Affiliates. Information on accessing these lists is available in our [Year-Round Organizing Resources](#).
- 5. Make a Freedom of Information Act (FOIA) request.** Reach out to your state affiliate for legal writing assistance at the local level. If necessary, the NEA Center for Organizing can provide sample language as well.

## Model Contract Language for Unit Member Information

**Section 1.** At the beginning of each school year, and at least every 60 days thereafter, the Employer shall supply the Union with the following information for each employee:

- name, home address, telephone number, cell phone number, and email address;
- employee identification number;
- most recent date of hire and seniority date(s), if different;
- job title, current assignment, work location, work telephone number, and work email address; and
- salary and/or any other form of compensation.

**Section 2.** At the beginning of each school year, and at least every 60 days thereafter, the Employer shall supply the Union with the following information for each employee:

- new hires, resignations, retirements, long-term unpaid leaves of absence, dismissals, and/or any other separations from employment; and
- any other changes in the information specified in Section 1 and the effective date of such changes.

**Section 3.** The Employer shall furnish the Union with the information specified in Section 1 for each new employee within one week after his/her date of hire.

# Objective 5: Track the Data

- 1. Use correct membership application.** Ensure your local is using the correct membership application during your Early Enrollment period. Before early enrollees will be granted access to qualified NEA Member Benefits programs, the state affiliate must first process the Early Enrollment forms and add new enrollees to the affiliate membership database.
- 2. Map worksites.** Utilize potential membership lists to identify and target worksites with the potential to increase membership.
- 3. Update your database.** Make sure that your lists and databases are as up-to-date as possible. Depending upon the size and resources of your local union, you may want to consider how this information will be stored, used, and shared. It's important to accurately track with dynamic numbers such as member conversions, members going on leave, and new hires coming into the unit.
- 4. Campaign activity reporting and tracking.** Encourage greater staff and member ownership through regular reporting and participation in daily debriefs and other campaign meetings.
- 5. Assess and document all worker contacts.** It's important to use a standard rating system. (Sample of the rating system is in the appendix.)
- 6. Follow-up with “undecideds.”** Draft detailed action plans to follow up with potential members who haven't yet committed to joining the union.
- 7. Track recruitment and engagement data in NEA's data systems.** NEA360 and NEA VAN are powerful tools for tracking engagements with potential members. Guidance and support for using VAN is available in our Year-Round Organizing Resources [here](#).

## Questions to ask yourself around data:

- Does your local union have a functioning database?
- Has your local been trained on the affiliate database?
- Will building representatives or activists get lists of their departments/work areas, and what information will be included on that list?
- How will information—contact sheets, membership forms, etc.—get entered back into the data entry system?

# Maintaining Local Growth & Strength

- **Celebrate successes.** Set up a time with your local's organizing team to debrief the campaign. What went well? Who were your potential leaders, and who will follow up with them? What were the major issues that came up during the conversations? Next steps?
- **Integrate newly identified leaders and members into the union.** It is critical to recognize that organizing is an ongoing process. A local that has achieved growth during an organizing campaign often experiences a period when new leaders are looking to play a meaningful role in the local.
- **Continue to focus on effective recruitment of new hires.** Make sure there is consistent member-to-member engagement. Host 10-minute building meetings and general membership meetings. Also, develop a year-round local communication plan. The plan should utilize a variety of communication platforms, including social media, email, and flyers.
- **Organize around issues.** Determine from the data collected which issues came up consistently from the one-on-ones. Utilize the issues identified to shape your local's strategic organizing campaign for the next year.



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