AutoPay Playbook

We welcome your feedback! Please reach out to yro@nea.org with any comments, content you'd like to see in future versions, or new learnings we can lift up. This playbook is meant to be an evolving document, with updates coming as we learn more about running effective AutoPay campaigns.

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Looking for more? Find the "AutoPay Resources" folder with helpful guidance and field materials at nea.org/yroresources

INTRODUCTION: Protect Your Power With a Proactive Strategy

Conversion campaigns are challenging and demanding. As the conversion efforts draw on your affiliate's resources, it will become increasingly difficult to focus on other priorities like membership growth and power-building. This is the ultimate goal of payroll deduction bans: to force affiliates into all-consuming conversion campaigns that prevent our union from building the power we need to protect public education.

Proactively converting our membership is the only way to neutralize this threat and protect our power. With every member who converts, the threat of an all-consuming campaign gets weaker and our power grows, turning their threat into an opportunity to reconnect with membership, reaffirm the value of our union, strengthen worksite structure, and build new union leaders.

As shown in the table below, state legislatures moved quickly to ban payroll deduction, giving our affiliates little to no time to convert their members. When faced with these near-impossible timelines, proactive conversion gives you the invaluable flexibility to dictate the scope and timing of your campaign, and there is strong evidence indicating that proactive conversion can significantly reduce membership losses, minimizing lasting impacts on power, density, and budget.

Recent Conversion Timelines Imposed by Legislatures

State	PRD Ban Bill Passed	Deadline to Flip (eff. date of PRD ban)	# of Days to Convert
Florida	SB256 – May 9, 2023	July 1, 2023	54
Kentucky	SB7 – Mar. 29, 2023	Mar. 29, 2023	0
Tennessee	SB281 – May 24, 2023	July 1, 2023	39
Arkansas	SB473 – Apr. 12, 2023	Aug. 1, 2023	112
West Virginia	HB2009 – Mar. 30, 2021	June 17, 2021	80
Indiana*	SB251 – Apr. 22, 2021	July 1, 2021	71

***Note:** *The Indiana General Assembly did not ban payroll deduction outright, but instead required that members reauthorize payroll deduction annually, which is tantamount to an outright ban.*

Average # of days to convert = 59

While no strategy will make AutoPay conversion painless, being proactive instead of reactive allows for an intentional campaign that supports membership growth and capacity-building while maintaining long-term solvency. Act now to protect your power and deliver on the vision of our union: a great public school for every student.

KEY STRATEGY 1:
Prepare Your Financial and Member Data Systems

GLOSSARY:

EFT	Electronic Funds Transfer (EFT) describes payments authorized from bank accounts.
RCC	Recurring Credit Card (RCC) describes payments authorized through credit (or debit) cards.
Draft Date	Draft Date is the date on which money is transferred from members' accounts to the state affiliate.
Close Date	Close Date is the date on which the payment file tells the bank which accounts to charge and how much is sent—typically 2-3 days before the draft date when money is actually taken out. After the file is sent, the charges cannot be stopped or edited. (Example: Affiliate sends a payment file on Monday, but the charge goes through on Wednesday. No changes can be made to the payments after the file is sent on Monday.)
FYMP	Future-Year Membership Processing (FYMP) is a process through which an affiliate's current year membership records are copied over to the next membership year; this creates the payment schedules and dues rates for the next membership year in IMS.
Pre-Note	Pre-note is a zero-dollar test transaction sent to verify the accuracy of bank account and routing information before money is transferred. Pre-notes allow affiliates to identify bad banking information.
Future-Year Conversion	After an affiliate has FYMPed, a member's payment information can be added directly to their future-year membership record in IMS. They will pay any remaining balance via payroll deduction and begin paying via AutoPay once the new membership year begins.
Collect-Only	A member submits their payment information; however, they will not begin paying dues, via new payment method (EFT/RCC), until their payment method is manually converted by staff.
Immediate Flips	A member submits their payment information and immediately begins paying dues, via their new payment method (EFT/RCC), starting with the next scheduled draft date.

Tactic 1:
Launch Your AutoPay Portal

Before your affiliate can begin converting members, you must set up your state's AutoPay Portal. The AutoPay Portal is NEA's online platform for processing EFT and RCC payments. Through the AutoPay Portal, members can switch payment methods from payroll deduction to AutoPay, as well as update bank account or credit card information. Launching your affiliate's AutoPay Portal can take up to four to six months, so if there is a chance you will need the AutoPay Portal, begin the process far in advance.

Start by building a team composed of NEA and affiliate staff to lead the conversion to AutoPay. Include your affiliate's executive director, business operations lead, field lead, membership processing lead, and your affiliate's general counsel. From NEA, include your regional director from the Center for Organizing, assigned field staff, the Membership Management Services (MMS) manager, and your MMS state contact. Notify your MMS state contact when you are ready to get started!

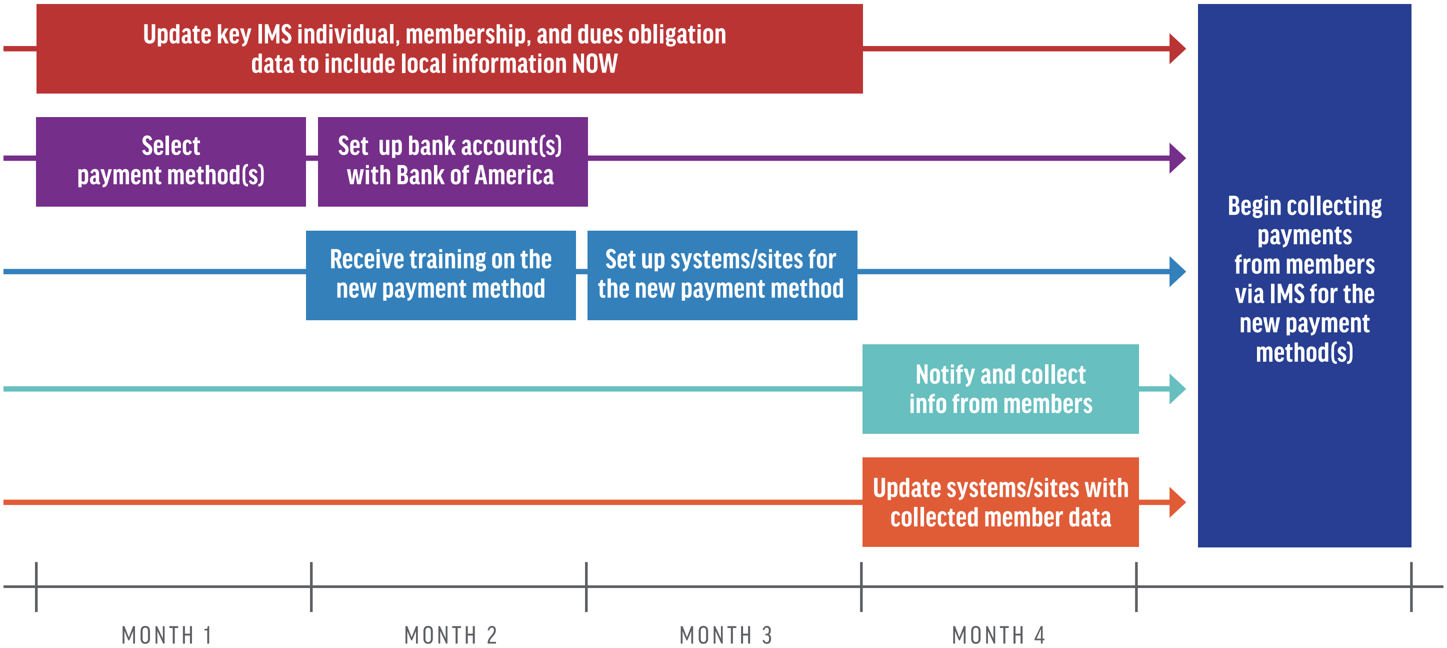
In order to launch your AutoPay Portal, you will need to know the local dues amounts for every local in your state—collect this information alongside employer payday schedules and contact information for local leaders.

Local dues amounts: This ensures the AutoPay Portal can charge members correctly for local dues.

Employer payday schedules: This will allow you to align dues draft dates with members' paydays, reducing payment rejections.

Local leadership: Make sure you have the contact information for the local president, as well as contact information for all building reps, the treasurer, and the membership chair. Ensure that the roles in NEA360 are current and accurate.

4-MONTH TIMELINE TO SET UP YOUR AUTOPAY PORTAL



For more information, reach out to your MMS state contact, listed in Appendix B.

PAYMENT METHODS

Before launching your campaign, decide which payment methods your affiliate will accept and on what terms.

EFT	CREDIT/DEBIT CARD
• $0.03 - $0.05 per transaction • $2.00 return fee per transaction paid • 80% of account updates handled automatically • 1% rejection rate • Lower "maintenance" costs, as fewer members change bank accounts than have expired credit cards that need to be chased down (even after the "Auto Updater" program)	• $0.09 per transaction • Fees and points cost 2%–4% of transaction value • No return transaction cost • NEA is enrolled in the credit card "Auto Updater" program, used to reduce the number of payments processed against "bad" cards (e.g., expired, etc.) • 10% rejection rate • Lead time is slightly longer due to the setup with the credit card processing vendor • Most members are more willing to give credit card information than banking information • Our research indicates that slightly more members will flip if given the option to pay with credit card

Affiliates are normally able to push EFT rejection rates down to about 1%. However, rejection rates for credit card payments will always be much higher, at around 10%.

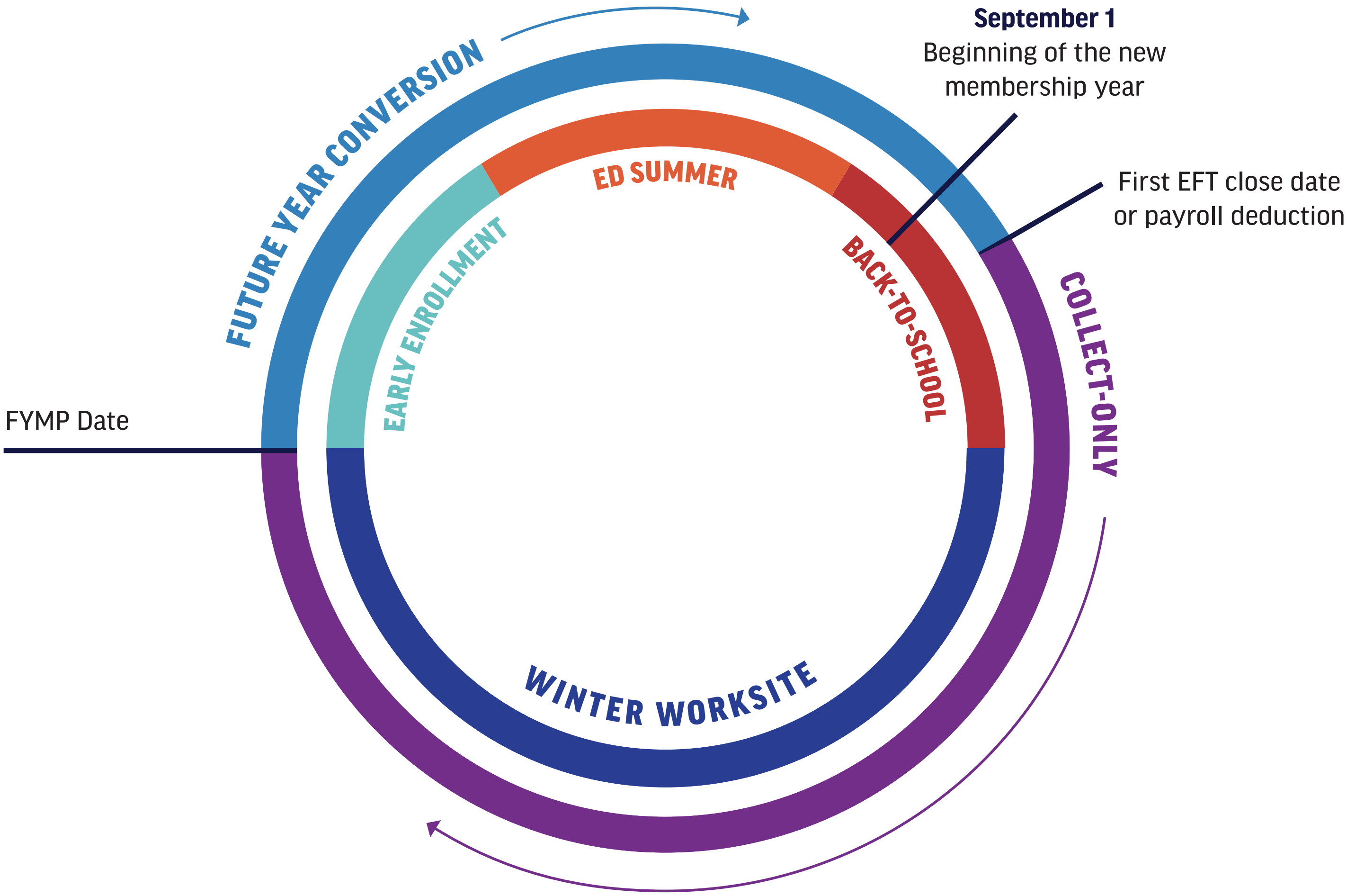
As a result, credit card payments cost ten times more in staff time devoted to chasing rejected payments, in addition to their significantly higher fees. For these reasons, we recommend pushing members away from credit card payments and towards EFT.

While there are a number of ways to encourage members to pay with EFT, many affiliates have opted to allow for 10 or 12 monthly payments with EFT, while requiring a single lump-sum payment for those paying via credit card. This approach discourages members from paying with credit card while reducing the amount of staff time spent chasing credit card payments.

Tactic 2:
Configure AutoPay Systems to Support Year-Round Collection

A YEAR-ROUND MODEL FOR PROACTIVE CONVERSION

Affiliates engage with members in many ways throughout the year: early enrollment campaigns, back-to-school recruitment, winter worksite visits, and more. Running your proactive conversion campaign year-round allows you to take full advantage of all these opportunities to collect members' payment information!



FUTURE-YEAR CONVERSION *(AFTER FYMP, BEFORE FIRST CLOSE DATE)*

Once your affiliate has completed Future-Year Membership Processing ("FYMPed"), use Future-Year Conversion to append payment information directly to a member's future-year membership record, meaning that the member's dues obligation for the upcoming membership year would be paid entirely via their chosen payment method (EFT/RCC). Any remaining balance for the current membership year would be paid via payroll deduction. This dramatically reduces workloads in membership and finance departments.

Future-Year Conversion is available at any point between your affiliate's FYMP date and the first EFT close date* or payroll deduction for the membership year, **meaning that the Early Enrollment period all the way through New Employee Orientations and other back-to-school events, are opportune times to gather members' payment information.**

** The date on which the payment file tells the bank which accounts to charge and how much is sent—typically 2-3 days before the draft date—when money is actually taken out. After the file is sent, the charges cannot be stopped or edited.*

AFTER THE FIRST EFT CLOSE DATE OR PAYROLL DEDUCTION

Our members are most accessible during the fall and winter months, which is a great time to collect their payment information! Continue your campaign by engaging worksite structures and conducting worksite visits.

Once members have begun paying their dues obligations, either via AutoPay or payroll deduction, members should complete the remainder of that membership year's dues obligation through the same payment method that was collected during enrollment. After the first EFT close date or payroll deduction, your affiliate can continue collecting members' payment information for use during the following membership year using Collect-Only.

COLLECT-ONLY:

After the first payroll deduction or EFT close date of the membership year, whichever comes first, affiliates should reconfigure their AutoPay Portal for Collect-Only, which collects members' payment information for use during the following membership year, meaning your affiliate can avoid time-consuming and logistically-challenging mid-year conversions. It's essential that members receive an email notice at least 10 days before the first draft date that provides accurate payment amounts and schedules.

To avoid rejected payments when members change their payment method, via AutoPay, affiliates should regularly request pre-notes, which can identify bad bank accounts and credit cards before they are charged.

WHY IMMEDIATE FLIPS?

Affiliates should configure Immediate Flips in select locals in order to road test and improve payment capture protocols with a smaller number of members before they must operate at scale. Under Immediate Flips, when members submit their payment information, their pay method is immediately converted to EFT/RCC, meaning their bank account or credit card is charged beginning on the next scheduled draft date.

Immediate Flips present two main logistical hurdles for affiliates:

1. Working with district payroll offices to stop payroll deductions in time to avoid a member being double-charged; and,
2. Quickly receiving payroll deduction files from district payroll offices and uploading them to IMS in time to ensure members are charged correctly.

Because of these hurdles, Immediate Flips are not a good fit for every local affiliate. Only local affiliates that have strong relationships with efficient, flexible payroll offices should be considered for Immediate Flips.

Allowing Immediate Flips by configuring "local overrides" for affiliates with strong partnerships with payroll offices creates a valuable testing ground. It enables affiliates to pilot and refine failed payment-capture processes with a small group of members before scaling up.

AUTOPAY PORTAL USER AGREEMENTS

NEA's Office of General Counsel has created an AutoPay User Agreement for affiliates to agree and adhere to. The acceptance and ability to adhere to these requirements ensures our members and our organizations are protected. To that end, every affiliate must understand these requirements and sign the AutoPay Portal User Agreement. You can find a copy of the AutoPay Portal User Agreement at nea.org/yroresources under the "AutoPay Resources" folder.

1. **Approve language changes:** All language changes on the AutoPay Portal should be approved by NEA's AutoPay team, which includes the NEA Office of General Counsel and should include the affiliate's counsel as well.
2. **Spot-check AutoPay Portal authorization screens:** Affiliates must regularly review their AutoPay Portal authorization screens to ensure estimates are accurate, legal language has not changed without approval, and all required information is provided at the time of authorization. AutoPay Portal screens should be regularly spot-checked to ensure that the AutoPay Portals accurately reflect:
    a. The type of account being used (e.g., credit card, checking account, savings account)
    b. The account information—including account number, expiration date, and CVV or CVC number for credit/debit cards; account number and routing number for checks used to establish payment by EFT
    c. The recurring nature of the membership dues obligation
    d. The initial payment period (e.g., membership year ending August 31, 2026)
    e. The total of the dues obligation for the initial payment period (membership year)
    f. The amount of each installment payment
    g. A description of the payment schedule (e.g., 1st day of each month)
    h. A description of when recurring payments will begin (e.g., 1st day of the month after you complete this authorization)
    i. Date of Authorization
3. **Provide Ten-Day Notices (Status Sheets):** Affiliates are required by law to provide written notice at least ten (10) days prior to the EFT close date for which any changes in payment amounts or schedules take effect. For members who enrolled in AutoPay months before their deductions begin, this notice reminds them of their commitment and provides a point of contact for any questions or changes, which is essential given the passage of time. Most importantly, these notices must reflect any changes in payment amounts or schedules that may have been finalized after members submitted their payment information.
    a. Given scheduled annual dues increases, affiliates must provide a Ten-Day Notice to each member paying via AutoPay ten (10) days prior to the first EFT close date of each membership year.
    b. If a member's missed payment leads to a change in payment amounts (missed amount is spread across remaining payments, next payment is doubled, etc.), a Ten-Day Notice must be sent.
    c. Any changes in payment schedules, whether due to a member's circumstance or affiliate logistical needs, requires a Ten-Day Notice to be sent.
4. **Configure AutoPay transaction emails:** In addition to sending Ten-Day Notices, affiliates must set up automatic emails to members for account updates, payment failures, and refunds. *See Key Strategy 1, Tactic 4 for more information on AutoPay transaction emails.*

Tactic 3:
Follow a Yearly Cycle for Reconciliation and List Maintenance

Clean and accurate lists are absolutely critical to converting your members and managing dues collection via AutoPay. Without strong lists, your conversion campaign will struggle to reach all members, and chasing rejected payments will be challenging.

Data cleansing is a cycle—not a one-time process. Good lists require constant care and attention. Take care of your lists, and they will take care of you! Before beginning your AutoPay campaign, take time to assess your lists by conducting a Membership Data Audit.

MEMBERSHIP DATA AUDIT

For all the member records in your system:

- What percentage have personal email addresses?
- What percentage have home addresses?
- What percentage have cell phone numbers?
- How many members are not coded to a worksite in NEA360?
- How many members have a non-deliverable home address or personal email address?

Worksite information:

- What percentage of worksites have building reps identified?
- Does the list of worksites in NEA360 contain all the worksites in your state?
- Has your state removed closed worksites?

Local Leaders/Roles information:

- What percentage of locals have a Local President identified with complete contact information in NEA360?
- What percentage of locals have a Membership Chair and Treasurer identified with complete contact information in NEA360?
- What percentage of worksites have a building rep listed with complete contact information in NEA360?

After completing a Membership Data Audit, work to verify and update contact information for all members and local leaders. Use all possible channels of communication to reach members to update/verify their contact information.

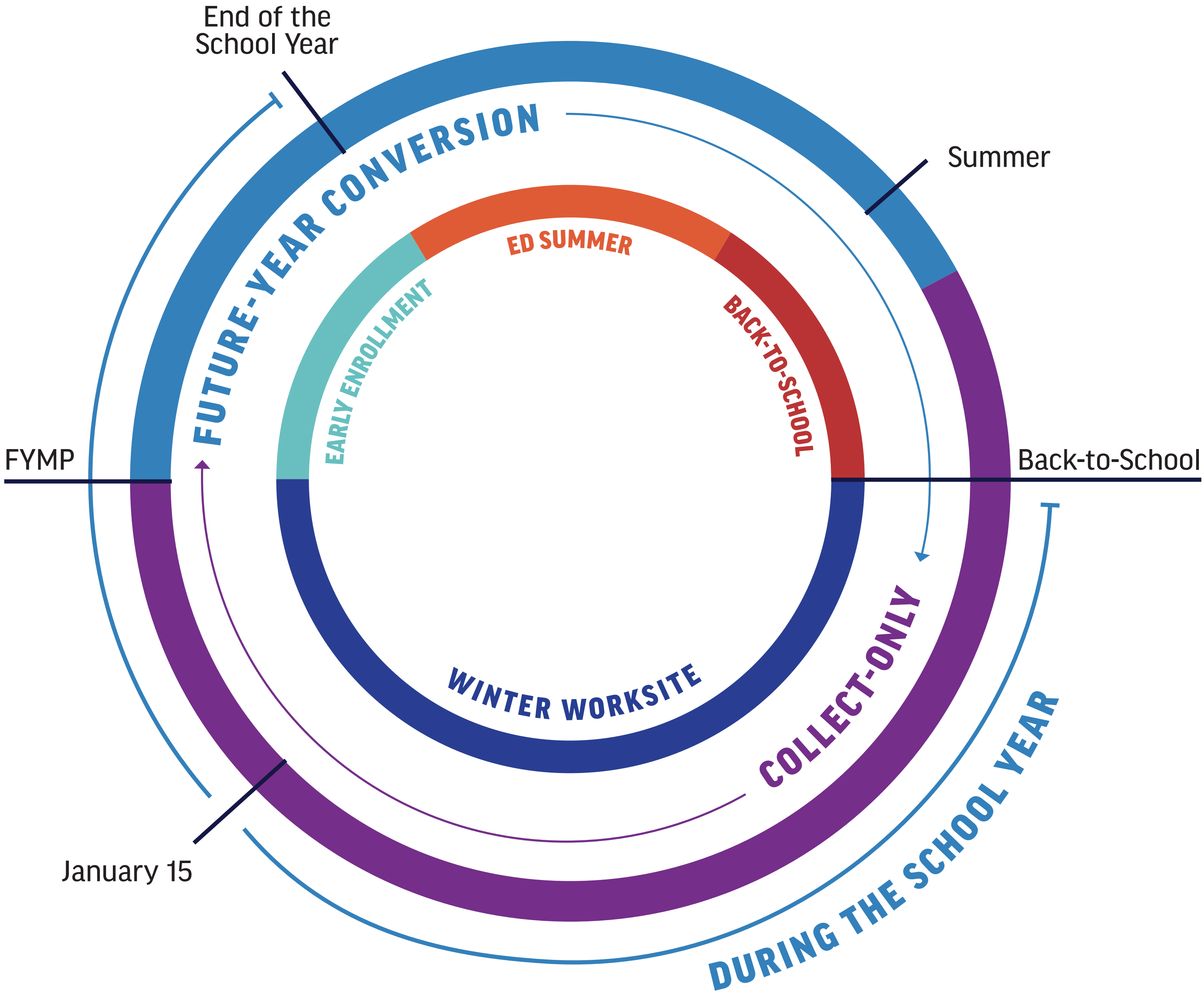
A SURROUND-SOUND APPROACH FOR UPDATING CONTACT INFORMATION

1. **Postcards:** Send postcards to members with a link for them to update their contact information in our secure system.
2. **Email Campaign:** Run an email campaign urging members to update their contact information!
3. **Telephonic Organizing Campaign:** Use a Telephonic Organizing campaign to have all members who did not fill out postcards or respond to emails update their contact information through a YRO survey!

Tip: Get creative! Members are more willing to update their contact information if it is tied to something interesting, such as a bargaining survey or digital birthday card! Attention-grabbing tactics that feel personalized work best.

The transition to AutoPay requires affiliates to carefully track transfers and retirements to avoid mistakenly charging former members, alongside managing a whole host of new AutoPay-related tasks. By following a yearly cycle for reconciliation and list maintenance, affiliates can boost efficiency by routinizing this work.

Maintaining good lists is often more than just a technical question—our lists are only as strong as the local leaders and structures that are responsible for keeping them clean. By empowering local leaders with data like Join Now Abandoners and Year-Round Organizing Field Leads to assist in follow-up after New Employee Orientations, you demonstrate the value good data can have for local organizing, encouraging leaders to be good stewards of their lists.



BACK-TO-SCHOOL:

- Send Ten-Day Notices to all members paying via AutoPay, including their updated total annual dues obligation, the schedule of payments, and recurring payment amounts.
- Have building reps and local leaders gather contact information for new hires at New Employee Orientations (NEOs) and verify local/worksite rosters.
    - *Digital tools (Hustle, email, Telephonic Organizing, etc.) can also be used*
- Use the Join Now Abandoners list to identify members who didn't complete the sign-up process at NEOs; send leads to local leaders for follow-up.

DURING THE SCHOOL YEAR:

- Work with members who have failed payments to re-try transactions or change payment methods.
- Send transaction emails as outlined in Key Strategy 1, Tactic 4.
- Continue to convert members and recruit potential members.

JANUARY 15:

- Ahead of the allocation of NEA RA delegates, work with local leaders to validate local rosters.

FUTURE-YEAR MEMBERSHIP PROCESSING *(FYMP)*:

- Before FYMP, reach out to locals to confirm payment schedules and dues rates for the upcoming membership year. It's best to begin this practice in early spring, especially if your affiliate participates in early enrollment.
- Ensure the AutoPay Portal is pointing at the correct year.
- Update deduction and close dates to ensure they do not fall on a weekend or a federal holiday, as the AutoPay Portal will not charge members on these days.
- Test Join Now for potential errors by going through each screen. Report those errors to your NEA state contact.
- Future-Year local transfers open via Join Now.

END OF THE SCHOOL YEAR:

- Convert pay method for members who have given payment information via Future-Year Conversion or Collect-Only; work with payroll offices to stop payroll deductions for these members.
- Work with local leaders and use digital tools to track retirements and upcoming transfers; stop dues drafts for retirees.

SUMMER:

- Request pre-notes to identify bad banking information; work with members to update payment information.
- Reach out to members whose credit cards were not updated by the auto-updater, and ensure they have a valid credit card on file before payments begin.
- Audit membership records: Do you have good contact information for all members?
- Audit local roles: Do you have roles listed for every local? Are the roles accurate? Cancel any active roles without active memberships.
- Confirm correct local dues amounts to prepare for Ten-Day Notices.

Tactic 4:
Use IMS Email Notifications to Comply With Legal Requirements

The IMS Email Notifications tool is essential for keeping members informed on the status of their membership and dues payments while complying with financial regulations and other legal requirements for collecting union dues.

Affiliates using NEA's AutoPay Portal are required to send the following notifications to members via email:

- Ten-Day Notices (Status Sheets)
- Account Update Confirmation
- Payment Notification
- Failed Payment Notification
- Refund Notification
- Renewal Notice
- Past Due Notices
- Cancellation Notice

Affiliates should consult with legal counsel to determine if state-specific regulations mandate additional notifications.

TEN-DAY NOTICES *(STATUS SHEETS)*

Federal regulations require that if we change a member's annual dues amount, recurring payment amount, or payment dues schedule in any way, we must first send the member notice of any such change 10 days prior to that change taking effect. We must send this "Ten-Day Notice," also known as a "status sheet," on an annual basis when we change dues rates, prior to the first EFT close date or the first time we run credit card charges, and during the year anytime there is a change in amount or the payment schedule.

Ten-Day Notices must be sent for new members, type changes, local-to-local transfers, or when a member misses a payment and elects to have it distributed across the remaining payments.

ACCOUNT UPDATE CONFIRMATION

Members must receive an email confirmation after their payment information is successfully submitted to the AutoPay Portal. Additionally, they must receive an email confirmation whenever their credit card or banking information is automatically updated or updated manually by the member using the AutoPay Portal.

PAYMENT NOTIFICATION

Members must receive an email notification that their payment was successfully completed. This must include the date, the amount, and account identifying information.

FAILED PAYMENT NOTIFICATION

Members must receive notification when their payment method has failed. This should also include a link to the AutoPay Portal where they can update their information and a contact person to whom they can reach out to with questions.

REFUND NOTIFICATION

If a member's dues need to be refunded, members must receive a notification stating the amount of the refund, the date of the refund, and details on the account where the money will be refunded.

RENEWAL NOTICE

This is sent to members who must renew their membership annually such as check payers and members who are required to reaffirm their membership on an annual basis. It can include information on how to switch to AutoPay and any other relevant information that the affiliate wants to include.

PAST DUE NOTICES

If a member has missed a payment for any reason, these notices inform the member of the amount that is past due and should include information on how to update their payment information and who to contact with any questions

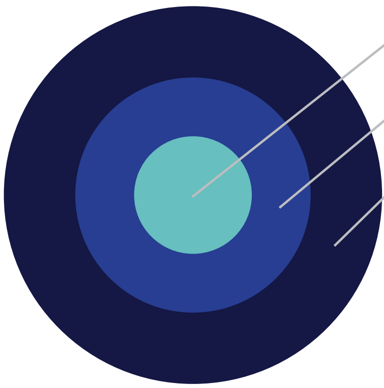
CANCELLATION NOTICE

This is sent to members when their membership is cancelled due to lack of payment or other reason. Information on whom to contact with questions, or how to re-join, should also be included.

KEY STRATEGY 2:
Prepare Your Leaders, Locals, and Allies

Tactic 1:
Build Governance Buy-In

Building governance buy-in is key to a successful AutoPay campaign, especially if you are pursuing a proactive strategy. Build buy-in at the highest levels before working outward, as shown in the graphic below.



CONVERT LEADERSHIP FIRST!

Governance leaders should be the early adopters for AutoPay. After they work through the process themselves, train all governance leaders on 1:1 conversations for converting members. Then, have local presidents convert before converting their leadership teams.

Begin with your state's officers and Board of Directors. Take time to meet and clearly articulate the real implications of losing payroll deduction on the organization's budget, density, power, and priorities. Understand the key priorities of governance in your state and establish the loss of payroll deduction as a direct threat to those specific priorities.

Remember, the threat should only be half the picture. Focus also on how your conversion campaign is an opportunity to strengthen your union by re-engaging with members, affirming their commitment to the vision of our union, and developing new structures and union leaders. Introduce proactive conversion as the best strategy to turn this threat into an opportunity.

Tip: Effectively managing AutoPay dues collection requires a clear membership cancellation policy for non-payment of dues. Begin preparing your Board to develop this policy.

Tactic 2:
Protect PRD in CBAs or Standalone Agreements

In states with mandatory or permissive bargaining rights, local unions can bargain provisions that extend after a ban comes into effect, protecting payroll deduction until the bargained provisions expire. Use this tactic to secure additional time to convert members, prioritizing conversion campaigns in locals without such protections.

CONDUCT A CONTRACT AUDIT

Most states that have banned payroll deduction have included provisions in their laws stating that if there is a collective bargaining agreement in effect providing for payroll deduction, it may continue until the CBA expires, but may not be modified or extended once the law takes effect. As a result, local unions should seek to extend existing provisions, or bargain new ones, before the law takes effect. This analysis will help establish a bargaining strategy and inform the prioritization of locals for conversion efforts. For each collective bargaining agreement reviewed, evaluate the strength of the payroll deduction provision using NEA's Model Payroll Provisions (Appendix C) and note the provision's expiration date.

Locals with payroll deduction provisions that could be improved	State affiliates should work with local leadership to bargain stronger PRD provisions based on NEA's model language (Appendix C). If a PRD ban is likely, locals should be encouraged to extend protections for payroll deduction as long as possible by elongating the duration clause, taking account of any statutory requirements regarding the life of a collective bargaining agreement.
Bargaining locals with no payroll deduction provisions	State affiliates should work with local leadership to bargain PRD provisions based on NEA's model language (Appendix C). If a PRD ban is imminent, consider pursuing mid-term bargaining to add these provisions.
Locals with bargaining rights but no contract	State affiliates should work with local leadership to explore the possibility of entering into a single-issue contract with the employer protecting PRD. For a sample cover letter and contract, check out Appendix D, Attachments B and C.

When negotiating standalone agreements to protect payroll deduction, work with your legal team to ensure that agreements will be enforceable.

Many district superintendents do not have strong opinions on payroll deduction. Have a priming conversation with the superintendent before pursuing a standalone agreement. Additionally, look for allies within superintendents' organizations and school boards who can help persuade their colleagues to support you.

Looking for more information? Reach out to your Collective Bargaining and Member Advocacy Department contact (found in Appendix A) or check out Appendices C and D, which discuss this tactic in greater detail.

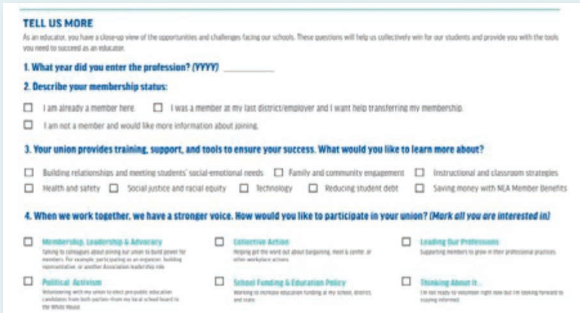
Tactic 3: Reconnect With Members Before Making the Conversion Ask

Our research tells us the most challenging members to convert are those who struggle to see the value of the union. Converting these members requires engaging with them on their priorities and rearticulating the vision of the union.

Before you convert, local leaders and volunteers should engage with as many members as possible, especially in worksites where the local has been less visible. Have local leadership conduct 1:1 conversations with members, asking them what they want from their union. Think of how the union might deliver on these priorities. Do members want to take action in their workplace? Do they want a professional development training? Consider recording their responses in a Year-Round Organizing card.

Year-Round Organizing Cards are a Good Touchpoint

Available through the Year-Round Organizing program, YRO cards are issue surveys that allow members to indicate how they might want to be active in our union. Another benefit of the cards is to confirm current contact information such as home phone numbers and home emails. Paired with in-person 1:1 conversations, YRO cards are a great way to re-engage with members while gathering accurate contact information.


TELL US MORE

As an educator, you have a close-up view of the opportunities and challenges facing our schools. These questions will help us collectively win for our students and provide you with the tools you need to succeed as an educator.

1. What year did you enter the profession? (YYYY) ____

2. Describe your membership status:

☐ I am already a member here ☐ I was a member at my last district/employer and I want help transferring my membership

☐ I am not a member and would like more information about joining

3. Your union provides training, support, and tools to ensure your success. What would you like to learn more about?

☐ Building relationships and meeting students' social-emotional needs ☐ Family and community engagement ☐ Instructional and classroom strategies

☐ Health and safety ☐ Social justice and racial equity ☐ Technology ☐ Reducing student debt ☐ Saving money with NEA Member Benefits

4. When we work together, we have a stronger voice. How would you like to participate in your union? (Mark all you are interested in)

☐ Membership, Leadership & Advocacy ☐ Collective Action ☐ Leading Our Professions

☐ Political Activism ☐ School Funding & Education Policy ☐ Thinking About It...

Tactic 4:
Work in Coalition to Defend Labor Rights

"Real change comes when we join forces. Working in coalition means sharing our strengths and standing side-by-side for our students and communities. No doubt about it, we are stronger together."

—Renée Pinkney, *President, Utah Education Association*
speaking about the Protect Utah Workers Coalition of 20+ labor unions that gathered more than 320,000 signatures in 30 days to successfully refer an anti-union bill to the ballot.

Beating back payroll deduction bans and other anti-union legislation is best done in solidarity with other labor unions. Start meeting regularly before the state legislative session begins to discuss priorities, threats, and opportunities. Create a coalition, and branded materials, that can be used to distribute information from a united labor table to legislators. The coalition should hire lobbyists, identify key legislators, and share target sheets at every meeting. Legislatures have tried to carve out police and firefighters from the most detrimental effects of legislation, but if the labor table stays united, bad bills can be defeated for the benefit of all workers.

Lessons learned from affiliates who have successfully defeated payroll deduction bans:

- Work in coalition
- Determine who has the ear of the key legislators
- Bring in members from strategic districts to tell their stories
- Continually revise talking points with coalition as legislation changes
- Email, Hustle, and phone bank members strategically throughout the campaign

Members are our most important messengers. Successful coalitions have brought in members on a weekly basis to meet one-on-one with key legislators. Best practice is to meet with members beforehand, review regularly updated talking points, and to debrief with them afterwards. Building strong coalitions and engaging members is the strategic path for winning pro-labor legislation.

KEY STRATEGY 3:
Develop a Surround-Sound Communication Plan

Tactic 1:
Keep Members Informed About Incoming Legislative Threats

According to our research, over half of our members have heard "just a little" or "nothing" about the bills that eliminate payroll deduction. What's worse, members who have heard little or nothing feel most negatively about being asked to make the flip.

In states facing immediate legislative threats, educate members about the legislation proposed by anti-public education politicians and explain how to protect their membership. Emphasize that they will lose their membership if they don't switch to AutoPay. Stress that enrollment is safe and secure and remind members that the union protects them and their students.

In states pursuing a proactive strategy, be careful not to rely too heavily on threat messaging. If the threat dissipates, members may no longer see the reason to convert. Instead, focus on the advantages of protecting their union membership.

Tactic 2:
Use Research-Backed Messaging

NEA conducted message research to determine the most effective messaging for converting members off of payroll deduction. This research informs the messaging guidance featured in this playbook.

SAMPLE TALKING POINTS

- Your union membership protects you from things like unfair retaliation and dismissal. But now you need to enroll in AutoPay to protect your membership because anti-public education politicians are attacking our union.
- Anti-public education politicians want to hurt our union and shrink our membership, which means lower salaries and benefits, fewer protections, and losing our voice for students in important conversations.
    - They eliminated members' ability to pay through automatic dues deduction.
- It's easy to protect your membership by enrolling in AutoPay, and the process is safe and secure.
    - Members who have already renewed their membership say it was quick and easy.
- Members who protect their membership through AutoPay will pay the same amount. The process is simple, and your bank information will be secure and remain private.
- In states pursuing a proactive strategy, be careful not to rely too heavily on threat messaging. If the threat dissipates, members may no longer see the reason to convert. Instead, focus on the advantages of protecting their union membership.

Do's and Don'ts

DO	DON'T
DO start with the fundamentals: Members need to enroll in AutoPay to stay a part of the union. Anti-public education politicians are eliminating/have eliminated members' ability to pay through automatic deduction.	**DON'T** say that AutoPay is a way to modernize or "update and upgrade" paying our dues. Similarly, don't remind members that many of us pay other bills automatically from our bank accounts.
DO stress the value of the union by talking about what is lost if anti-public education politicians weaken the union: reduced bargaining power, lower pay and benefits, less protection, and policies that hurt our schools.	**DON'T** focus on who has access (limited union staff) or who doesn't have access (administrators/school boards) to payment information.
DO say "AutoPay" or simply "Renewal" or "Membership Renewal." Refer to "protecting your membership."	**DON'T** say "eDues," "direct pay," or "EFT," and do not say "recommit" or "recommit your membership."

Tactic 3: Use Hustle, Email, and Telephonic Organizing to Complement Field Work

"Establishing multiple modes of communication between the members, OEA, and the local is key. We have a sequential communication approach that begins one month out from the first site visit, which includes OEA, the local leader, and building reps, reaching members through email, face-to-face, workplace postcards, and Hustle."

—Rhonda Harlow, *Executive Director, Oklahoma Education Association*

While we can't expect digital tools to convert a large percentage of membership, building a strong surround-sound strategy can go a long way in supporting the in-person work and raising awareness about the switch to AutoPay. Use these tools to complement your field strategy, like by sending Hustle messages to members ahead of a worksite visit.

When building a surround-sound plan, don't just focus on what will be sent out from the state level. How can partners like local presidents or building reps contribute to your surround-sound campaign? Using a variety of media from different senders will help your message stick.

Our research shows that many members are unaware of payroll deduction bans. Members who are unaware of bans feel more negatively about flipping. Make sure your members are well informed. Additionally, think about how you can use your surround-sound strategy to identify volunteers to help in the conversion efforts. How can members who want to help contribute to the campaign? If the communication includes a link to the AutoPay Portal, include the Member ID number to help members make the switch.

Telephonic organizing can be a useful tool at many points during your AutoPay campaign. In addition to calling members to convert them over the phone, our call center can also update contact information, identify new leaders/activists, and help alert members to the loss of payroll deduction through phone calls. For more information, please reach out to yro@nea.org or see Appendix E: Telephonic Conversion Supports.

SUPPORTING YOUR IN-PERSON ORGANIZING WITH DIGITAL SURROUND SOUND

BEFORE			IN-PERSON	FOLLOW-UP
Email from State: What is the legislature doing? Update contact/ worksite info!	**Email from Building Rep:** Announce a 10-minute meeting to convert	**Email from Building Rep:** Don't forget about tomorrow's meeting!	**Worksite Conversion Meeting!**	**Email from Building Rep:** If you couldn't make it, I'll find you to convert!
Email from State: What's AutoPay? Why should I convert?	**Email from Building Rep:** Conversion team is coming soon!	**Hustle:** Conversion team at your school tomorrow! *include NEA ID #	**Worksite Visit!**	**Building Rep:** 1:1 conversations with unconverted members
Calls: Alert members to threat, update contact/ worksite info!	**Hustle from Local:** Time to convert! Interested in volunteering?	**Email from Building Rep:** I'll be coming to see you to talk about AutoPay!	**1:1 Conversations with Building Rep**	**Email from Building Rep:** Thank you for converting! Please remind your friends.

INSERTING NEA MEMBERSHIP ID NUMBER INTO COMMUNICATIONS

In order to convert to AutoPay, members will need their NEA ID number. Fortunately, this number can be inserted into communications like Hustles or emails through a merge field. For help setting up a merge field for NEA ID, contact NEA's Center for Communications.

BASIC AUTOPAY MESSAGE

We all want someone to have our back, and as educators, we know our union membership protects us. Together, our voice is stronger for our students, school funding, and better pay and benefits. It's important to protect our membership.

Our power depends on our numbers. The more members in our union, the more collective power we have to bargain for the things that matter to us, like our students and schools. That's exactly why anti-public education politicians are attacking our union.

Anti-public education politicians are trying to weaken the union, which will hurt our bargaining power, lower our pay and benefits, decrease our union protection, and allow these politicians to drive policies that hurt our students, schools, and classrooms.

If we let them win, we lose our power to fight for decent salaries and benefits, protect educators from unfair treatment, and stand up to these politicians' overreach into the classroom and our students' education. By enrolling, we protect our ability to have input on the decisions that affect our jobs, students, and schools.

We are standing together and building our numbers so we have the collective power to bargain for the things that matter to us and stand up to these politicians' overreach into the classroom. Every one of us should renew with AutoPay to protect our union membership. It's easy to enroll, and our information stays secure.

Broadcast and Escalation Messages

CORE BROADCAST MESSAGE

The most effective message to persuade most members to switch is a simple one that should be shared broadly by state affiliates and locals through all channels (for example: emails, social postings, worksite flyers, direct mail, meeting announcements, phone banks, etc.). Many members will need multiple reminders to complete the AutoPay switch.

- ✦ You need to switch to AutoPay to stay in the union. Your dues will stay the same.
    - Anti-public education politicians are eliminating/have eliminated our ability to pay our dues through automatic payroll deductions.
- ✦ Protect your union membership that protects you by switching to AutoPay.
    - They want to weaken our union so they can push an anti-public education agenda that hurts us and our students—like vouchers that take money away from our schools and reduce the pensions we've earned.
- ✦ Switching to AutoPay is **easy, quick,** and a **one-time change.**
    - It's a simple switch that only takes a few minutes. The amount stays the same, and our dues will still be deducted on payday. Sign up once and you're done.
- ✦ Protecting your membership is the only way to stop anti-public education politicians from weakening our union.
    - Being an educator is tough, and to earn better wages and benefits, we need to stick together.

CORE ESCALATION MESSAGE

*Most members will need multiple reminders and nudges to switch. Other members need to have their concerns heard and hear more about the value of their union membership to switch. These members need an overall retention message—not related to the specifics of AutoPay—because their hesitation to switch is not rooted in concerns about the process. Customize 1:1 scripts with **important wins that affect members' daily lives—the tangible benefits of union membership.***

- ✦ Your union has your back, and your union membership protects you.
    - Even great educators sometimes find themselves unfairly attacked or accused, but our union stays on your side. High-quality liability insurance gives us access to first-rate attorneys to resolve the issue.
- ✦ Our union fights for better wages and benefits that we deserve and improves our daily lives by winning dedicated planning time, bathroom breaks, and extra pay for extra duties.
    - We do our jobs to help kids, but too many politicians think becoming a teacher or support staff means taking a vow of poverty.
- ✦ Our power depends on our numbers. The more members like you in our union, the stronger a voice we have.
    - Anti-public education politicians want to weaken our union, and weaken our voice, for their own benefit.
- ✦ It will be open season on educators like us if we leave the union—we'll lose our power to fight for the salaries, benefits, and treatment we deserve.
    - Politicians who don't know anything about our jobs already make too many decisions about our schools. You work too hard to let them have even more control over your job or your pension.

Sample Emails, Hustle Scripts, and Posts

As mentioned in the section above, there are two core steps to your AutoPay communications campaign: the core broadcast message and the core escalation message.

Digital messaging should reinforce these steps by educating members on three main points:

- Anti-public education politicians either have passed or are threatening to pass legislation that directly threatens their union membership.
- They can protect their membership through an easy, secure, and one-time change: switching to AutoPay.
- **If they need follow up:** Remind them of the value of union membership; that we are standing together and building our numbers so we have the collective power to advocate for the things that matter to us, from our students to school funding to better pay and benefits.

Use the sample scripts below to share these important messages with your members!

Reach every member multiple times!

Sample Email *(Imminent Threat, Broadcast)*:

SUBJECT: Protect your union membership

PREHEADER: Make the switch to AutoPay

BODY:

[First Name or Friend],

As educators, our voices are stronger when we speak together. The more members in our union, the more collective power we have to advocate for the things that matter to us, like what's best for our students and schools.

That's exactly why anti-public education politicians are attacking our union—to weaken educator voices for their own benefit.

Protect your union membership by signing up for AutoPay. The process is safe, secure, and easy.

These politicians have recently passed limits to restrict the methods our union can use to collect member dues. **Due to this legislation, you must switch your dues to AutoPay by [DATE] in order to maintain your membership in our union.**

Make sure anti-education politicians can't take away your union membership.

Here's what you'll need to switch to AutoPay:

- Make sure you have your credit card or bank information ready
- *[Include any information needed for log-in to your dues collection system. For AutoPay, that is NEA Member ID and ZIP code.]*

< Sign up for AutoPay today >

AutoPay is a convenient way to pay dues through automatic deductions from a checking or savings account, credit card, or personal/bank check. AutoPay is done through a secure bank site, keeping your financial information private and safe.

It's a simple switch that only takes a few minutes. The amount stays the same, and our dues will still be deducted on payday. Sign up once and you're done!

Switch your payment method to AutoPay today so that we can continue to create the working conditions we need and the learning conditions our students deserve.

Please let us know if you have any questions about AutoPay or why switching your payment method is important. Just reply to this email and we'll connect with you!

In solidarity,

[Name]

Sample Email *(Imminent Threat, Escalation)*:

SUBJECT: Together educators are stronger.

PREHEADER: Why your union membership is important.

BODY:

[First Name or Friend],

When educators come together, we are powerful. Our union membership gives us a collective voice to advocate for the things that matter to us, like our students and schools. We have won changes across the state that improve our daily lives, from pay raises to protected planning time.

[Insert example of a win from your state or local. Example: Here in South Carolina, hundreds of educators came together to advocate at the state capitol and won big! The legislature unanimously passed a bill providing six weeks of paid parental leave.]

The more members like you in our union, the stronger we are. Switching to AutoPay makes sure your voice is heard!

However, not everyone wants us to succeed. Anti-education politicians in our state see our union as a threat to their corporate donors and political future. They are using every tool to weaken our voices, including eliminating our ability to pay our dues through automatic payroll deductions.

Due to recent legislation, if you do not switch to AutoPay by [DATE], your union membership will be cancelled.

< Sign up for AutoPay today >

Luckily, you can act today to protect your membership and the future of our work for public education by signing up for AutoPay!

Updating your payment method to AutoPay helps us ensure anti-education politicians and their allies don't stop us from advocating for the working conditions we need and the learning conditions our students deserve.

Your log-in information: *[Include any information needed to log in to your dues payment platform. For AutoPay, that is NEA Member ID and ZIP code.]*

AutoPay is a secure and private way to pay your union dues without depending on payroll deduction.

< Make the switch today >

Our opponents know that when we come together, we will win higher pay for educators, better learning conditions for our students, and the funding increases our schools need.

Thank you for taking action to protect your union membership and ensure that we can continue to advocate for our future for years to come.

In solidarity,

[Name]

Sample Hustle Script *(Imminent Threat, Broadcast)*:

TYPE: Share a Link Goal

LINK: https://edues.nea.org/eDues/righthere.jsp

SCRIPT: <Member Name>, I'm <Organizer Name> w/NEA! Changes in state law have put your union membership at risk. Will you act to protect it? Text STOP to quit.

> **IF YES:** Great! Switching to AutoPay ensures no one can stop you from paying your union dues. Signing up is safe, secure, and easy: <Link>
>
> **IF NO:** I understand, <Member Name>. Are there any questions I can answer about AutoPay that would make you ready to switch and protect your union membership?
>
> ***Important note:** Be sure to have NEA ID and ZIP code available.*

Sample Hustle Script *(Imminent Threat, Escalation)*:

TYPE: Share a Link Goal

LINK: https://edues.nea.org/eDues/righthere.jsp

SCRIPT: <Member Name>, I'm <Organizer Name> at NEA! Following up, have you switched to AutoPay to protect your union membership? Text STOP to quit

> **IF YES:** Amazing! Our power depends on our numbers. Will you share the link to sign up for AutoPay with three of your colleagues? <Link>
>
> **IF NO:** No problem! Unless you switch to AutoPay by [DATE], your union membership will be cancelled. May I ask what is holding you back?
>
> ***Important note:** Be sure to have NEA ID and ZIP code available.*

Sample Social Media *(Imminent Threat)*:

Bluesky/Threads/Others

When educators come together, we are powerful.

Protect your union membership by taking proactive action to ensure no one can stop you from paying dues. Sign up for AutoPay today: <Link>

Instagram

🚨 State legislators have restricted the methods we can use to collect member dues. This is a direct attack on our ability to advocate for our students, our schools, and each other.

We need your help. Update your payment method today to protect your union membership and help us ensure these restrictions don't stop us from advocating for the working conditions we need and the learning conditions our students deserve. Click the link in our bio to update to AutoPay today!

Facebook

You can act today to keep our union strong. Changing your dues payments to AutoPay is a safe, secure, and convenient way to protect your membership and ensure we can keep advocating for educators across our state.

Make the switch today: <Link>

Sample Website Copy:

TITLE: Protect Your Union Membership

SUBHEADER: Anti-education politicians are trying to weaken our union by mandating that educators switch from automatic payroll deduction by [DATE] in order to maintain their union membership. Luckily, switching to AutoPay is a one-time process that is easy, quick, and secure.

COPY:

Our union membership gives us a collective voice to advocate for the things that matter to us, like our students and schools. Together, we have won changes across the state that improve our daily lives, from pay raises to protected planning time.

However, not everyone wants us to succeed. Anti-education politicians in our state see our union as a threat to their corporate donors and political future. They are using every tool to weaken our voices, including eliminating our ability to pay our dues through automatic payroll deductions.

Due to recent legislation, if you do not switch your dues payments from automatic payroll deductions by [DATE], your union membership will be cancelled.

Updating your payment method to AutoPay helps us ensure anti-education politicians and their allies don't stop us from advocating for the working conditions we need and the learning conditions our students deserve.

< Switch Your Payment to AutoPay >

Switching to AutoPay is: Easy, Quick, and a One-Time Change.

AutoPay is a convenient way to pay dues through automatic deductions from a checking or savings account, credit card, or personal/bank check. AutoPay is done through a secure bank site, keeping your financial information private and safe.

It's a simple switch that only takes a few minutes. The amount stays the same, and our dues will still be deducted on payday. Sign up once and you're done!

Make sure anti-education politicians can't take away your union membership. Here's what you'll need to switch to AutoPay:

- Make sure you have your credit card or bank information ready
- *[Include any information needed for log-in to your dues collection system. For AutoPay, that is NEA Member ID and ZIP code.]*

< Sign Up for AutoPay >

Thank you for taking action to protect your union membership and ensure that we can continue to advocate for our future for years to come.

Need help or have questions about the switch to AutoPay? We're happy to chat! Contact us at [EMAIL ADDRESS] or call us at [PHONE NUMBER].

Sample Email *(Proactive, Broadcast)*:

EMAIL

SUBJECT: Protect your union membership

PREHEADER: Make the switch to AutoPay

BODY:

[First Name or Friend],

When educators come together, we are powerful. Our union membership gives us a collective voice to advocate for the things that matter to us, like our students and schools. We have won changes across the state that improve our daily lives, from pay raises to protected planning time.

[State Affiliate] members are acting today to keep our voices strong. Sign up for AutoPay!

Not everyone wants us to succeed. Anti-public education politicians across the country are spearheading efforts to attack educator voices by creating new hurdles to union membership. We have seen payroll deduction bans pass in other states, leaving members scrambling at the last minute to find other ways to pay their dues.

We won't wait until our union is under attack. At the [State Affiliate], we want to be prepared so that we can maintain our power while making the process as smooth as possible for our members.

Protect your union membership today by switching to AutoPay!

We are proactively switching to a payment system called AutoPay. It's a simple switch that only takes a few minutes. The amount stays the same and our dues will still be deducted on payday. Sign up once and you're done.

Here's what you'll need to switch to AutoPay:

- Make sure you have your credit card or bank information ready
- [Include any information needed for log-in to your dues collection system. For NEA's AutoPay Portal, that is NEA Member ID and ZIP code. If possible, have those auto populate here so they don't need to look them up. This can be done in VAN and SalesForce Marketing Cloud]

[Button: Make the Switch]

Our opponents know that when we come together, we win higher pay for members, better learning conditions for our students, and the funding increases our schools' needs.

Thank you for taking action to protect your union membership and our power to advocate for our future for years to come.

In solidarity,

[Name]

Sample Email *(Proactive, Escalation)*:

SUBJECT: Don't Forget! Make the switch to AutoPay

PREHEADER: Together we can protect our union membership

BODY:

[First Name or Friend],

Last week, we sent you an email about some of the new ways anti-public education politicians are working to limit the ways union members can pay their dues. This is a direct attack on our ability to fight for the changes we know our schools need.

We've seen payroll deduction bans pass in other states. That is why we are asking you to take proactive action to protect your union membership by switching to AutoPay today.

AutoPay is a quick and easy way to pay your union dues without depending on payroll deduction.

< Make the Switch Today >

Not everyone wants us to succeed. Anti-public education politicians across the country are spearheading efforts to attack educator voices by creating new hurdles to union membership. We have seen payroll deduction bans pass in other states, leaving members scrambling at the last minute to find other ways to pay their dues.

We won't wait until our union is under attack. At the [State Affiliate], we want to be prepared so that we can maintain our power while making the process as smooth as possible for our members.

Protect your union membership today by switching to AutoPay!

AutoPay is a convenient way to pay dues through automatic deductions from a checking or savings account, credit card, or personal/bank check. AutoPay is done through a secure bank site, keeping your financial information private and safe.

It's a simple switch that only takes a few minutes. The payment amount stays the same and our dues will still be deducted on payday. Sign up once and you're done!

Your log-in information: [Include any information needed to log in to your dues payment platform. For NEA's AutoPay Portal, that is NEA Member ID and ZIP code]

< Sign up for AutoPay >

If we let them win, we lose our power to fight for decent salaries and benefits, protect educators from unfair treatment, and stand up to these politicians' overreach into the classroom and our students' education.

Thank you for protecting your union membership and raising your voice for the future of public education.

In solidarity,

[Name]

Sample Hustle Script *(Proactive, Broadcast)*:

TYPE: Share a Link Goal

LINK: [Your AutoPay Link]

SCRIPT: <Member Name>, I'm <Organizer Name> with [SEA]! Anti-education politicians are attacking unions nationwide by banning payroll deduction. A simple change can protect your membership. Are you interested? Text STOP to quit.

> **IF YES:** Great! Switching to AutoPay ensures no one can stop you from paying your union dues. Signing up is quick and easy: <Link>
>
> **IF NO:** I understand, <Member Name>. Are there any questions I can answer about AutoPay that would help you make the decision to switch?

Sample Hustle Script *(Proactive, Escalation)*:

TYPE: Share a Link Goal

LINK: [Your AutoPay Link]

SCRIPT: <Member Name>, I'm <Organizer Name> at NEA! Following up, have you acted to protect your union membership by switching to AutoPay? Text STOP to quit.

> **IF YES:** Amazing! Our power depends on our numbers. Will you share the link to switch with three of your colleagues? <Link>
>
> **IF NO:** No problem! We need as many educators as possible to switch to AutoPay to strengthen our union. May I ask what is holding you back?

Sample Social Media *(Proactive)*:

Bluesky/Threads/Others

When educators come together, we are powerful.

Anti-education politicians across the country are trying to make it harder to pay union dues. AutoPay is a quick and easy way to protect your union membership without depending on payroll deduction: [Link]

Instagram

🚨 Anti-education politicians in other states are voting to restrict the methods we can use to collect member dues. This is a direct attack on educators' ability to advocate for our students, our schools, and each other.

We need your help. Switching your payment method to AutoPay helps protect us against similar legislation by putting the power to collect dues in our hands. Click the link in our bio to update to AutoPay today!

Facebook

[State Affiliate] is taking proactive steps to protect your union membership and ensure we can keep advocating for educators across our state. Join us by switching to AutoPay today: [Link]

Every second counts, convert to AutoPay now!

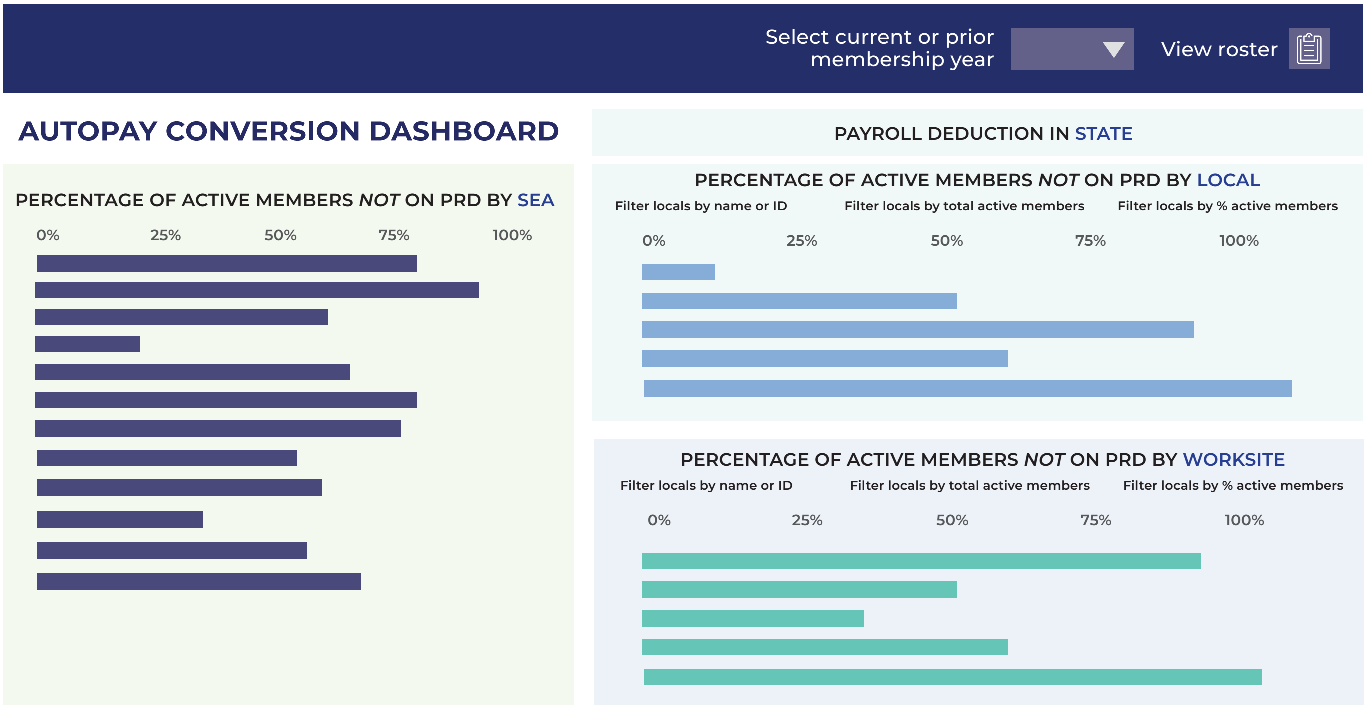
KEY STRATEGY 4:
Reach Every Member Multiple Times

Tactic 1:
Empower Local Leaders With Data Using the NEA AutoPay Dashboard

NEA's AutoPay Dashboard is your field campaign's one-stop shop for tracking conversion progress across your affiliate and quickly pulling rosters of unconverted members by local and worksite with ease! In order to effectively convert members, everyone involved in your campaign needs access to the most accurate data on who has or has not converted and how to contact them. Fortunately, NEA's AutoPay Dashboard makes it easy to equip the campaign with accurate lists of members who have not converted, along with their contact information.

Note: Please be vigilant in protecting confidential information. Only provide necessary information and remind staff and leaders to zealously guard that information.

GUIDE TO THE NEA AUTOPAY DASHBOARD



***Note:** To protect sensitive information, we've included only a simplified version of the dashboard. To request full access, email toolsupport@nea.org.*

The NEA AutoPay Dashboard is an excellent tool for checking on the conversion progress in your state affiliate, locals, and individual worksites. The data is updated daily and reflects the percentage of members not on payroll deduction, as well as those in the "waiting room" who have AutoPay information on file but are still on PRD.

On the left side of the screen, click on a state's dark blue bar to show that state's locals and worksites. Using the sliders at the top of the screen, you can filter and sort locals and worksites based on their number of members and the percentage converted. Click on the roster tab from the dashboard, and you can easily download rosters of members by local and worksite, with their ZIP code, VAN ID, NEA ID, and PRD status. The dashboard also links directly to members' VAN profiles. Access to the NEA AutoPay Dashboard is limited to staff only. If you'd like access, please email toolsupport@nea.org to request it.

Tactic 2:
Design Campaign Strategy Based on Structure and Data Assessment

A thorough and well-informed planning process is critical to the success of your AutoPay campaign. Before choosing tactics and targets, affiliates should work with UniServ staff, member leaders, and data specialists to assess the strength of local structures and member data.

Questions for Member Leaders:

- Which worksites in your locals have strong building reps?
- How can your campaign build up new member leaders in your local who may need some support?
- What campaigns or issues is your local working on that your AutoPay campaign can support?

Questions for UniServ Directors:

- Which locals have strong worksite-based structures with trusted building reps that can be activated to convert members?
    - Tip: Use NEA's Local Association Building Rep/Worksite Structure Assessment tool as a guide!
- Which districts/worksites are the most permissive when it comes to building access for staff or released leaders?
- Where are locals running issue or bargaining campaigns that can be used as touchpoints for your conversion campaign?
- Which locals have strong leadership teams that could help with the AutoPay conversion?
- Which locals have strong relationships with flexible district payroll offices?

Questions for Data Specialists:

- Which locals have the most robust member contact information?
    - Email addresses, mobile phone numbers, home addresses, etc.
- Which locals have strong member leaders who can help with data entry and updates throughout the campaign?

Once your team has completed this assessment, use it to inform which locals your campaign should target and with what tactics. For example, locals with strong worksite structures should activate those structures to encourage members to convert to AutoPay. Locals with developing structures and poor member contact information will need additional support.

Tactic 3:
Activate Worksite Leaders

Trusted building reps are the most effective organizers when it comes to AutoPay conversion! Worksite leaders have strong relationships with members, easy access to buildings, and knowledge of planning periods and other non-instructional time.

Where it works: Locals with strong worksite structures and trusted building reps in most buildings

Best practices:

Begin by holding a meeting with the local's leadership team and building reps. Provide information on how the AutoPay conversion process will work for members in your affiliate and then have local leaders and building reps convert themselves. Train them on how to talk to members about the importance of AutoPay conversion and how to guide members through the AutoPay Portal.

Building reps should leave the meeting with a plan to use 10-minute meetings, 1:1 conversations, mailers, and other tactics to convert the members at their worksites. Additionally, building reps should be provided with the following to support their conversion efforts:

- Regularly updated lists of members who still need to convert, with their membership IDs and ZIP codes (See Key Strategy 4 Tactic 1 for how to pull this information from the NEA AutoPay Dashboard)
- FAQ sheet with answers to common member questions
- A list of routing numbers for local banks
- Screenshots and instructions on how to navigate the AutoPay Portal and anticipated questions
- Talking points on the importance of converting to AutoPay now
- Sample 10-minute meeting agenda

Remember, around 80% of members will need a 1:1 conversation to convert to AutoPay. *Use this as an opportunity to gather information from members about workplace concerns, bargaining topics, or other issue campaigns.* It is also an excellent time to identify potential leaders and update member contact information.

> "Our leadership team and building reps had one-on-one conversations to gather every member's bargaining priorities, and we walked through how to reach out to legislators about vouchers, school funding, and teacher pay. Coupling EZ-Dues (AutoPay) with our other priorities reinforced the importance of being union members in the first place and helped us hit 100% signed up within a week."
>
> **—Shannon Matosich,** *Anaconda Teachers' Union President*

Sample 10-Minute Meeting Agenda

Welcome and Purpose (1 minute)

Welcome members and share that the meeting will be focused on AutoPay conversion.

Why Is It Important for Members to Convert to AutoPay Now? (3 minutes)

Update members on campaign benchmarks and any legislative threats.

Discussion (2 minutes)

Members who have already enrolled in AutoPay should share their experiences.
Answer any questions members have about the process.

Action Item: Convert to AutoPay (4 minutes)

Give members their NEA membership IDs and ZIP codes on file.
Share the link to the AutoPay Portal.
Support members if they encounter issues.

Thank members as they leave!

Tactic 4:
Energize Members Through Worksite Blitzes

A worksite blitz is a way to kickstart momentum in your campaign by maximizing the number of conversations in a concentrated period of time. Members, staff, and volunteers from outside your local will need to be briefed on the issues and challenges in your district to ensure success.

Where it works: Locals/regions with high member density

Preparing for the blitz:

- Consider how your blitz can support other goals for the local. Engage with local leadership: What work is the local doing, and how can the blitz support it? Is there a bargaining survey or other ask for members that the blitz can amplify?
    - Connecting your AutoPay campaign to local wins and issue campaigns helps demonstrate the value of the union and builds stronger relationships with members.
- Members should be aware of threats to payroll deduction before the volunteers arrive. Work with local leadership to raise awareness through mailers, calls, texts, and emails.
- Gather schedules of planning periods and lunch times so volunteers can plan to connect with members at these times.
- Prepare materials for your campaign, including lists of unconverted members with contact information, NEA membership ID, and ZIP code; FAQ sheets for converting to AutoPay; a list of routing numbers for local banks; and local B.R.A.G. sheets.
- Plan to talk to potential members while in the worksites by having lists of potential members, local B.R.A.G. sheets, membership packets, and a link to Join Now.

During the blitz:

- Have volunteers use digital tools (like text and emails) to notify members before a scheduled visit.
- If possible, release the building rep for the day to collaborate with the volunteers.
- At the school building:
    - Ask to set up in the lounge or another space where members congregate.
    - Ask if an announcement can be made over the PA system reminding members where you will be.
    - Use planning/lunch schedules to determine the best time to reach the members you need to convert.
    - Have one volunteer stationed in the staging location to assist members while they convert, while other volunteers use the planning/lunch schedules to meet members and potential members where they are.
    - Identify new potential leaders to assist with the campaign.

Following the blitz:

- Hold a debrief for volunteers and leaders to celebrate wins and share learnings from the visits.
- Collect contact information for potential leaders, potential members, and members who may need follow-up support.
- Create a follow-up plan for members and leaders to contact members who failed to convert, recruit potential members, and engage new leaders.

Engage Potential Members Too!

Blitzes are an excellent time to recruit and engage potential members! Prepare volunteers with information on wins for the local union and any leads for follow-up. Provide lists of potential members so volunteers will know who to target for membership asks. Train volunteers to help potential members sign up through Join Now.

Tactic 5:
Plan Pop-Up Events for Members to Convert

GREAT TACTIC FOR SUMMER!

Where it works: Locals with good contact information, limited/no building access

Best practices:

Hosting a pop-up event in partnership with a local business is a fun way to encourage members to convert to AutoPay! Members are invited to visit a local business where leaders and volunteers will help them convert to AutoPay.

Selecting a Local Business Partner:

When choosing a local business to partner with for your pop-up event, begin by considering what members want. Are there local spots frequented by members?

Choosing a business that aligns with the values of your members may help drive turnout. Consider supporting minority-owned or pro-worker businesses that support your local's values.

It's also important to consider the physical location of your pop-up. Is it close to worksites or other locations your members will be at? Consider maximizing your pop-ups by scheduling them around district events, such as commencement, sporting events, and district wide PD, that would make it easy for a large number of members to stop by.

Before the Pop-Up:

Drive turnout to your pop-up using digital tools, mailers, and worksite structures. It may be helpful to set up a Hustle text bank for a night-before reminder. Encourage members to attend and convert to AutoPay while having time to build connections with other members they might not usually see. Prepare similar materials as you would for a blitz: lists of members with contact information, NEA membership IDs, and ZIP codes; FAQ sheets; and lists of routing numbers for local banks. Don't forget your laptop, QR codes, and other necessary materials to convert members.

During the Pop-Up:

Set up a table for members to meet with you and convert. Take advantage of this time when members may not be in a hurry—are there other volunteer or leadership asks you could be making at this time? Ensure there is space for members to connect with each other. This is a great opportunity for members to socialize and build relationships with members they may not be able to see regularly.

Turn Union Events Into Pop-Ups

During a conversion campaign, take advantage of all union events (Rep Assemblies, Board Meetings, P.D. sessions, etc.) to convert members to AutoPay. Leaders and active members are our best AutoPay ambassadors.

Tactic 6: Convert Members Through Home Visits

GREAT TACTIC FOR SUMMER!

Where it works: Locals with accurate home address information where members live in close proximity to each other, limited/no building access

Best practices:

Home visits (knocking on doors) are a great way to target members who need to convert. If you are planning on using home visits as a tactic, pre-work is essential to success. Here are some things to consider:

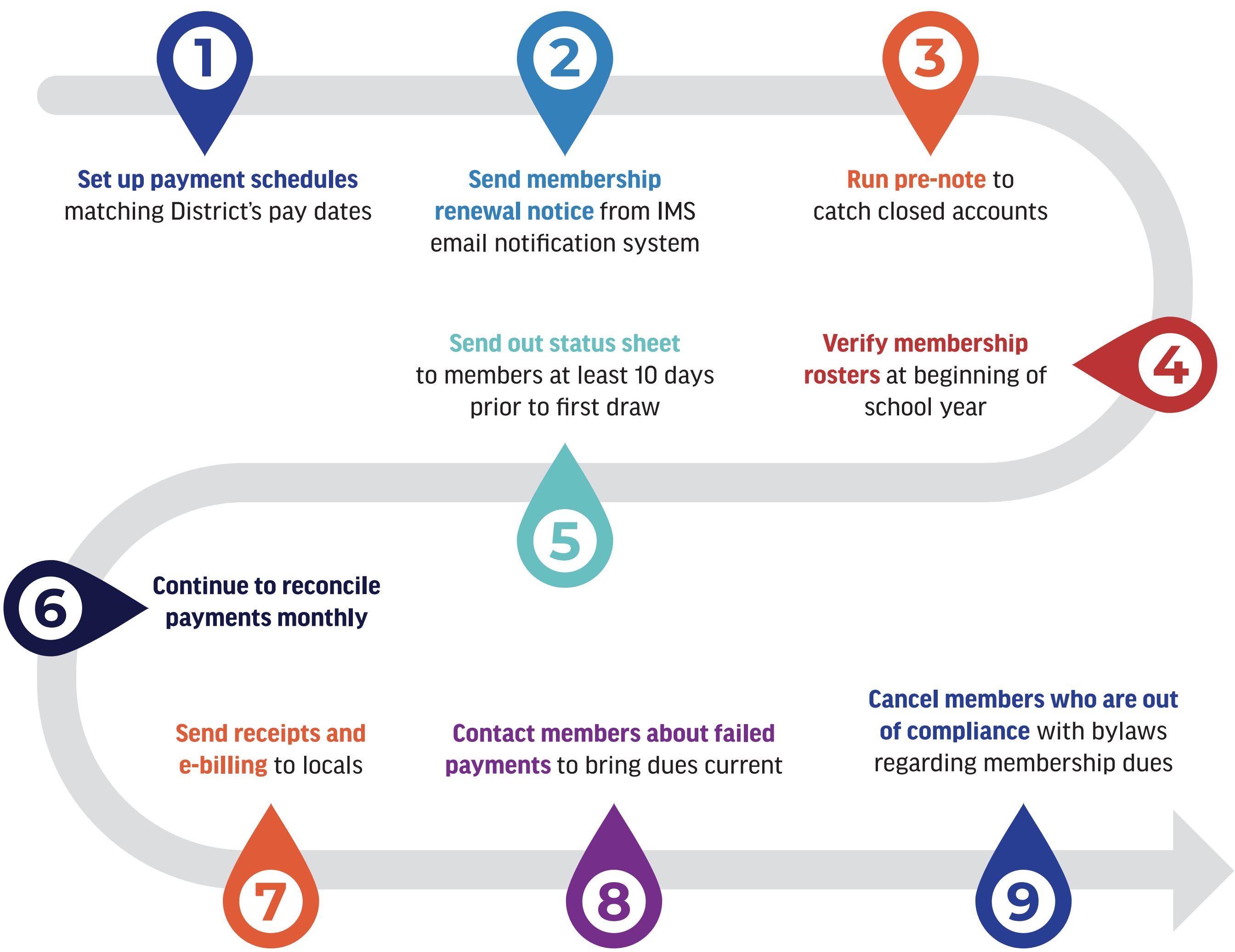
- **Targeting locals/areas:** Look at the list of members who remain on Payroll Deduction and consider the locals that have a high density of members left to convert. *When thinking of areas to knock on doors, consider how to maximize volunteers time by focusing on geographical areas with a large number of doors to knock.*
- **Assembling your team:** Home visits are most effective when led by members. A member will always be the best person to have conversations with their coworkers. This is an opportunity for staff to pair with member organizers, member leaders, and local leaders to coach and develop their skills while converting their coworkers. As you are doing pre-work, consider whom you want on your dream team and when the member leaders will be available.
- **Data:** Home visits require accurate addresses to make the best use of volunteers' time. If your data is not up to date, consider doing a data cleanse campaign before you start home visits. Also use this opportunity to update member worksites, personal cell phone numbers, and other important information.
- **Communication:** Home visits should not be the first time a member hears about AutoPay conversion. Similar to worksite blitzes, they should be layered with other communications to introduce members to the campaign.
- **Organizing Materials:** Ensure that you have all the materials to give to volunteers before they knock on doors. Refer to Tactic 3: Activate Worksite Leaders for a list of necessary materials for volunteers to have everything they need to help a member convert.
- **Leave Behinds:** Create material to leave at members' doors when they are not home. The leave behinds should communicate why we are asking them to convert to AutoPay, how to convert, and a QR code to easily access the AutoPay Portal. Create space on the leave behinds to write the member's NEA ID and ZIP code for ease of conversion.
- **Training:** A thorough training is important to the success of the home visits and the experience of volunteers. An AutoPay home visit training should include:
  - Messaging for the campaign
  - A walk-through on how to convert someone's membership
  - MiniVAN: How to record attempts, record assessments or other data points you are collecting, and the preloaded script
  - Roleplay and 1:1 conversation training
  - Logistical and safety information

KEY STRATEGY 5:
Strengthen Payment Capture Systems

GLOSSARY

Payment Capture	Payment capture occurs when dues leave a member's account and are transferred to the union successfully.
Rejected Payment	A rejected payment is when an EFT or RCC charge does not go through. Most common causes of payment rejections are: • Insufficient funds/credit limit reached • Bank account closed/credit card expired • Member disputed the charge
Payment Chase	Payment chase describes the multi-step system for collecting dues from members who have had a rejected payment.
Reconciliation	Reconciliation is the process of matching individual dues payments with money received to ensure current members' accounts are complete and accurate.

Building an Effective Payment Capture System



Tactic 1:
Reduce Rejected Payments

For EFT payments, we strongly recommend aligning the draft schedule to members' paydays. When they first begin collecting dues via AutoPay, many affiliates shy away from having multiple payment schedules in order to minimize the logistical burden on membership processing staff. However, running multiple payment schedules aligned with members' paydays significantly reduces rejected payments, minimizing time-intensive payment chase work. The most effective payment chase strategy is to reduce rejections!

By following these steps, many affiliates have been able to reduce EFT rejection rates to around 1%.

It is more difficult to reduce rejection rates for credit card transactions. The easiest way to reduce credit card rejections is to spread the dues obligation over fewer transactions, minimizing opportunities for a failed payment. For example, an affiliate could offer quarterly payments for credit card payers, while offering monthly draws for EFT payers. Some affiliates have had success limiting credit card payers to a single draw date for the entire annual dues obligation.

Tip: *1-2 weeks before drafting members' accounts via EFT, request a pre-note from NEA. The pre-note will check for closed bank accounts before the payment draft, allowing staff to rectify the issue with the member before a payment is rejected.*

Tactic 2:
Reconcile Payments and Membership Rosters

Once members have been converted to AutoPay, it is critical to ensure that all payments are applied to the correct member and local dues are forwarded to the correct local. Reconciliation is the process of matching payments to members and identifying rejected payments.

It is important to leave time to verify local rosters at the beginning of the school year before payment drafts begin. Verifying rosters before the first EFT or credit/debit charge will help prevent double-charging members who have transferred locals or mistakenly charging members who have retired.

Since AutoPay takes the employer out of the dues collection process, systems must be in place to continually update when member's dues obligation ends, either because they have transferred, retired, or resigned. Under payroll deduction, if a member left a district or retired, the payments would be stopped automatically by the employer. However, when collecting dues via AutoPay, members will continue to be charged until the membership department is notified that they have left the district or retired. Local leaders, association representatives, and other governance members should institute regular roster validation and develop procedures to notify membership departments when members are transferring locals or retiring.

Since membership departments may need to reach out about payment information, work locations and Association roles should be updated and stored in a centralized database such as NEA360.

Tip: *Looking for more information on how to maintain accurate membership rosters? Check out* ***Key Strategy 1, Tactic 4: Routinize data cleansing*** *(Page 11)**.*

RECONCILING EFT RETURN STATEMENTS

Affiliates will receive an EFT Return Statement from Bank of America listing the successful and rejected payments, as well as any closed bank accounts. This report, coupled with receipts from IMS FRS and reports from IMS Custom Extracts and MRA, will provide membership processors and financial staff with the information that they need to reconcile payments to members and identify members whose payments were rejected. It is imperative to notify members of missed payments as soon as possible so that they can provide updated information to stay current with their membership dues obligation.

BUILDING TRUST WITH LARGE LOCALS

Many large locals resist AutoPay because of changes in their revenue flow. With AutoPay, dues are collected at the state level before being disbursed to the local and to NEA. Sending FRS receipt reports from MRA, showing how much money the state received and how much has been sent to the local and to NEA, can help to build trust and overcome resistance with large locals. Additionally, state affiliates should collaborate with locals to determine disbursement dates for dues.

SAMPLE RECEIPT

Receipt Search

Owner Org:
Billable Party:
Mshp Year:
Payment Category:
Receipt Amt:
Receipt Description:

Reference #:
Reference Date:
Process From Date:
Process To Date:

Individual ID:
Batch #:
Batch Date:
Batch Desc:
Pymt Trans ID:

Search Reset

Pay Category	Indv ID	Pymt TransID	Name	Amount	Ref #	Ref Date	Mshp Yr	Descriptions	Batch #	Batch Date	Batch Description	Process Date
EFT	001	12345	Joe	$4.75		01/01/25	2025	Sample	67890	01/01/25	EFT Deposits	01/01/25
EFT	002	12346	John	$4.75		01/01/25	2025	Sample	67890	01/01/25	EFT Deposits	01/01/25
EFT	003	12347	Jim	$4.75		01/01/25	2025	Sample	67890	01/01/25	EFT Deposits	01/01/25
EFT	004	12348	Jane	$4.75		01/01/25	2025	Sample	67890	01/01/25	EFT Deposits	01/01/25

Tactic 3: Systemize Payment Chase

MEMBERSHIP PROCESSORS SHOULD HANDLE PAYMENT CHASE

Payment chase—the process of collecting dues from members after their payment was rejected—is a significant challenge that comes with collecting dues via AutoPay.

Payment chase processes should be centralized and handled by your affiliate's membership processing staff for several reasons:

1. **Efficiency:** Membership processors are uniquely equipped to communicate with members and make immediate changes directly in IMS, eliminating chains of communication that can increase the risk of errors.
2. **Communication:** Membership processors understand how to handle sensitive, confidential matters with members in a professional and respectful way.
3. **Simplicity:** Assigning this work to a membership processor, instead of a complex patchwork of staff and leaders, greatly reduces the risk of error and ensures that all missed payments will have a timely follow-up.
4. **Compliance:** There are legal rules around collecting rejected EFT and RCC payments. By centralizing this work to a smaller group of staff who can be more easily trained, your affiliate can minimize legal risk.

EFFECTIVE PAYMENT CHASE SYSTEMS

The best payment chase systems communicate with individual members using multiple methods, while ensuring local leadership is aware of membership status.

Most affiliates bifurcate their approach to payment chase based on whether the payment was rejected because of (1) a closed bank account or expired credit/debit card and (2) insufficient funds or exceeding one's credit limit. This is because insufficient funds or credit limit reached are temporary issues, while a closed bank account/credit card is permanent and will require the affiliate to obtain new payment information immediately.

SAMPLE REJECTED PAYMENT PROCESS: INSUFFICIENT FUNDS/CREDIT LIMIT EXCEEDED

1. Membership department is notified that a payment has been rejected for insufficient funds or because a member has exceeded their credit card limit.
2. The member will receive an automated email alerting them to the rejected payment and providing information regarding their options. The email should direct the member to contact the state's membership department immediately.
3. Affiliates can attempt to retry a failed EFT draft only after notifying the member that they will do so. Affiliates do not need to notify the member if they are retrying a credit card charge.
4. If the member still has not paid, membership processing staff will call the member.
5. Only if membership processing staff is unable to contact the member should the issue be escalated to UniServ staff or local leadership.
6. A monthly email may be scheduled automatically to the members who have repeatedly missed/rejected payments.
7. After all these steps have been exhausted with no resolution, notify the member that their membership will be cancelled in accordance with affiliate bylaws.

Caution: *Do not reveal information about members' finances to staff or local leadership. Do not say that payments were rejected because of "insufficient funds" or because the member exceeded their credit line. Instead, simply refer to a generalized "payment issue." Train staff and leaders on how to address members' finances with sensitivity and professionalism.*

OPTIONS FOR MAKING UP A MISSED PAYMENT

1. Schedule a one-time payment with a credit card to make up the difference.
2. Retry the EFT transaction at a later date when the member will have funds in their account and only after they have provided authorization.
3. Make a double payment on the next scheduled EFT draft.
4. Spread the missed payment out across all remaining scheduled EFT drafts.

IMPORTANT: *If a member elects to make a double payment or spread the missed payment out, a new status sheet with new draft amounts MUST be sent more than 10 days before the new draft amount begins.*

Since rejections for a closed bank account or a closed or expired credit card are permanent issues, direct membership processing staff to call members immediately. Typically, affiliates will give members a shorter timeframe to provide a new bank account or credit card number than to rectify insufficient funds. New banking or credit card information should only be collected over the phone or through the eDues site, and never via text, email, or in writing. This information should be entered into the AutoPay Portal by the member or entered into IMS immediately by staff, and never written down for future entry.

When collecting dues via AutoPay, the state affiliate will know more about the status of a local's members than local leadership because dues are collected at the state level. State affiliates should set up systems to communicate membership issues to local leadership. While it is not their responsibility to collect dues, local leaders can often be helpful in engaging with members and should be kept informed on all changes to their membership.

Tactic 4:
Develop Clear Cancellation Policies

AutoPay requires clear policies dictating when members will be cancelled for non-payment of dues. Developing and enforcing clear cancellation policies protects your affiliate from legal liability. Inconsistent cancellation practices could lead to some members retaining the rights and benefits of membership for longer than other members, setting up a potential Duty of Fair Representation claim.

Without a clear policy, leaders and staff will struggle to apply the rules with consistency.

Most affiliates tie cancellation to several missed payments or a length of time since the last successful payment (e.g., members are cancelled after two consecutive missed payments or two months of non-payment).

Strong cancellation policies must go hand in hand with strong drop and save protocols. Often, members will not take seriously non-payment of dues until they receive their cancellation notice, and then they will want to re-join. Develop a standardized procedure for outreach to cancelled members. All cancellation notices should include information on how and why to re-join.

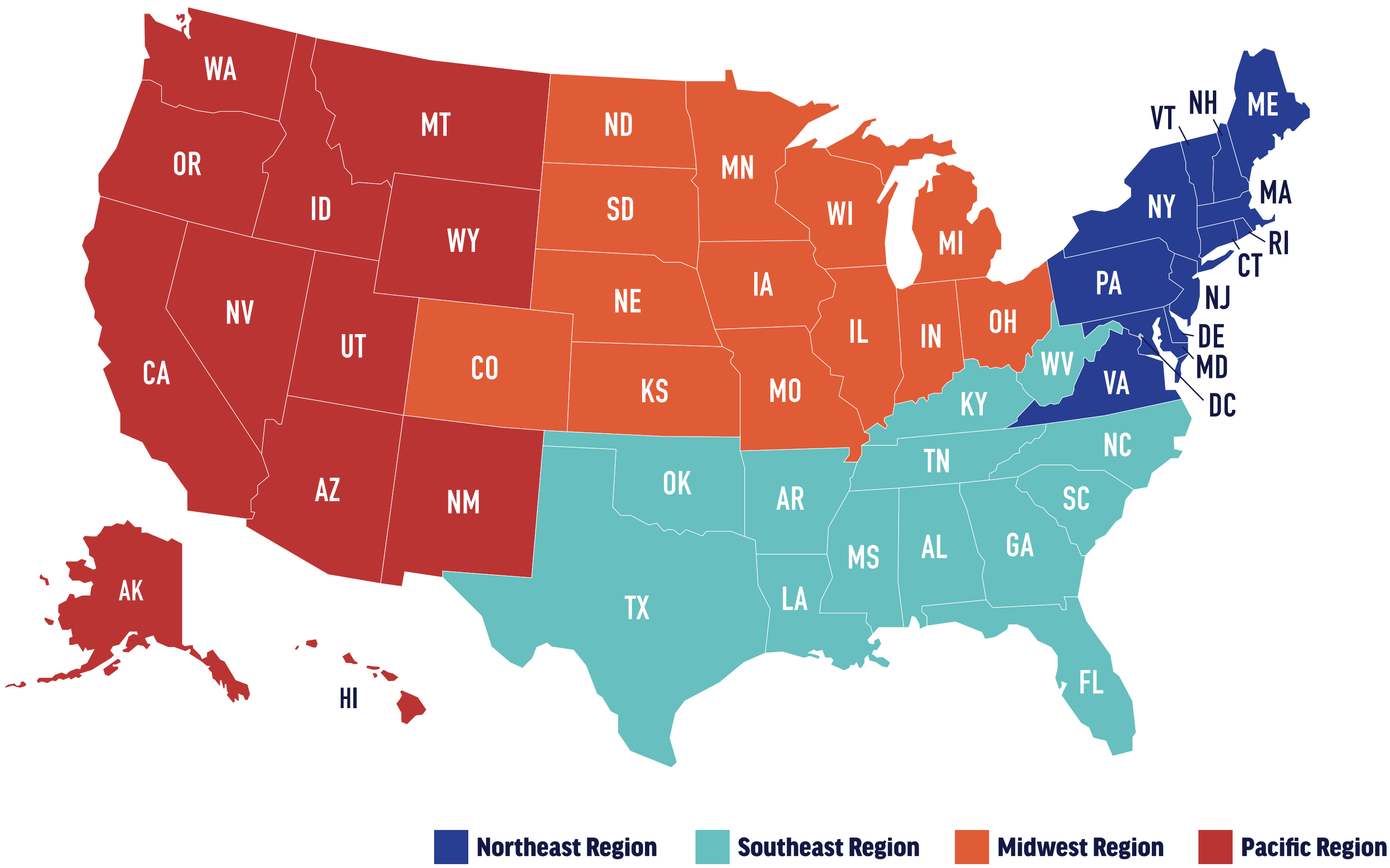
If a legal ban on payroll deduction has been passed, determine when members who fail to convert to AutoPay will be cancelled. Since cancelled members can no longer convert through the AutoPay Portal and must re-join as a new member, it is advantageous to give members a long time to convert—however, note that keeping large amounts of non-paying members on the rolls can carry serious financial implications for your affiliate.

CONCLUSION:

Thank you for reading the AutoPay Campaign Playbook. The Center for Organizing and Affiliate Support is always here to assist you during your AutoPay campaign. This playbook is meant to be a living document, evolving over time as we learn more about conducting successful AutoPay campaigns.

Please reach out to yro@nea.org with any suggestions or new learnings to include.

APPENDIX A:
NEA Contact Sheet for AutoPay Campaigns



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APPENDIX B:
IMS, MRA Reports for AutoPay

Source	Report	Description	NEA Tool Pathway
IMS	Membership with EFT or RCC with Discrepancies (5)	This report lists any errors in the membership with the EFT method.	IMS Reports>Custom Data Extract
IMS	Credit Card Account Updater Extract (28)	This extract lists all credit card updates automatically processed by CyberSource for the selected month. It categorizes record responses into four types: Account Closed, Contact Card Holder, New Account Number, and New Expiration Date. NEA360 will automatically update the individual's account profile for "New Account Number" and "New Expiration Date responses."	IMS Reports>Custom Data Extract
IMS	Members Assigned to EFT Schedule (06)	This extract will list all members enrolled to pay with EFT and the name of the schedule assigned to the member.	IMS Reports>Custom Data Extract
IMS	List of Members with Obligation and Payment by Pay Method (27)	This extract will list all members, their obligations, and payments by payment method.	IMS Reports>Custom Data Extract
IMS	EFT/RCC Deduction Count Extract (14)	This extract will provide a list of all EFT/RCC members along with detailed information about the schedule assigned to the member.	IMS Reports>Custom Data Extract
IMS	Members with EFT RCC account profile but the Membership is not yet switched (21)	This extract will list all members who have an active EFT or RCC account profile and the Membership pay method is not EFT or RCC. This extract compares regardless of the source or date of profile.	IMS Reports>Custom Data Extract
IMS	List of members with a single deduction (22)	This extract lists all members with a single EFT or RCC deduction type set up.	IMS Reports>Custom Data Extract
IMS	EFT/RCC Enrollment (24)	This extract will list all members who were enrolled to pay using EFT or RCC pay methods through AutoPay portal and IMS.	IMS Reports>Custom Data Extract
IMS	Rejected Payment Transactions	Allows the affiliate to list, reprocess missed dues payments or cancel the membership.	eDues>Rejected Payments> Rejected Pymt Txns
IMS	Payment Statistics	Allows the affiliate to see and pull individual payment rejected transactions trend analysis.	eDues>Rejected Payments> Pymt Statistics

APPENDIX B:
IMS, MRA Reports for AutoPay *(Continued)*

Source	Report	Description	NEA Tool Pathway
MRA	EDUES2200 - eDues Pay Method and Account Information Comparison	Reports: • Members with Account Profile & Payment Profile • Members with Account Profile & Missing Payment Profile • Members with Payment Profile & Missing Account Profile • Members with Both Account & Payment Profiles Missing	Team Content>Membership> Membership Portal Reports> Standard Reports>eDues
MRA	INDP0400 - Individual Payment Rejected Transactions	This report generates rejected individual payment transactions and can be sorted by UniServ/Local.	Team Content>Membership> Membership Portal Reports> Standard Reports>Individual Reports
MRA	INDP0304 - EFT Pre-note Transaction Analysis	This report displays the EFT pre-note transaction status after scheduling the pre-note first. States will need to contact NEA to schedule the pre-note for this report to generate information.	Team Content>Membership> Membership Portal Reports> Standard Reports>Individual Reports
MRA	INDP1020 - EFT Bank Account and Routing Number Monitoring Report	This report displays individuals that are using the same accounts for dues payments for EFT only.	Team Content>Membership> Membership Portal Reports> Standard Reports>Individual Reports
MRA	INDP1081 - State Affiliates Deduction Schedule by Pay Method	List state/local affiliate deduction scheduled by the eDues pay methods.	Team Content>Membership> Membership Portal Reports> Standard Reports>Individual Reports
MRA	INDP2000 - Individual Payments YTD Transactions	List individuals based on YTD receipts by different pay methods and locals. This report can be run as an extract to include mailing and email information.	Team Content>Membership> Membership Portal Reports> Standard Reports>Individual Reports
MRA	INDP1010 - Individual Payments Distribution Summary by Funds for Projected and Successful Transactions	This report displays the fund information by payment date. This report is ideal for sharing with locals to report the disbursements determined by the successful receipts.	Team Content>Membership> Membership Portal Reports> Standard Reports>Individual Reports
MRA	INDP1012 - Individual Payments Distribution Details by Funds for Projected and Successful Transactions	This report displays the receipts by individual and fund group by payment date. This report is ideal for sharing with locals to report the disbursements determined by the successful receipts.	Team Content>Membership> Membership Portal Reports> Standard Reports>Individual Reports

APPENDIX B:
IMS, MRA Reports for AutoPay *(Continued)*

Source	Report	Description	NEA Tool Pathway
MRA	NDP0402 - Individual Payment Rejected Transactions Trend Analysis	This report displays individual payment rejected transactions trend analysis. The report allows the user to select individuals in the highlighted analysis to determine the rejected reasons.	Team Content>Membership> Membership Portal Reports> Standard Reports>Individual Reports
MRA	RAR0150 - Accounts Receivable Summary - Percentage Paid	This report displays the percentage of dues collected for the membership year.	Team Content>Membership> Membership Portal Reports> Standard Reports>Funds Receivable
MRA	FRTR0800 - Daily Transaction Report	This report displays receipts posted to FRS. The report is ideal to find rejected transactions for bank reconciliations as well.	Team Content>Membership> Membership Portal Reports> Standard Reports>Funds Receivable

APPENDIX C:
Payroll Deduction Model Provisions and Bargaining Guidance

Guidance and Model Language

COLLECTIVE BARGAINING AND MEMBER ADVOCACY DEPARTMENT • AUGUST 2023

Introduction: Since 2010, many states have enacted laws prohibiting payroll deduction (PRD) of union dues as politicians who are hostile toward collective bargaining continue to look for ways to attempt to weaken unions. This document was developed to provide model language for affiliates to help preserve the ability to collect union dues. As state laws differ on this topic, local affiliates should seek counsel from their state association before implementing or proposing any of the language provided in this document.

Dues Authorization

The employer should not be involved in the process by which individual members join or leave the union. Likewise, an employee's authorization or cancellation of the withholding of association dues is an internal union issue that should not be a part of a collective bargaining agreement (CBA) or otherwise involve the employer. The employer's responsibility in this matter should be expressly limited to honoring the terms of an employee's payroll deduction authorization by deducting dues in amounts designated by the union from employees identified by the union and promptly transmitting dues dollars to the local or state association. The language of the CBA should be limited to describing the employer's responsibilities in this regard and, if necessary, insulating the employer from legal liability.

NEA's Office of the General Counsel developed a **Toolkit on Membership Agreements** that is the one-stop shop for information about our membership agreements. It addresses dues authorization agreements, maintenance of dues, and the need to stay away from anything resembling maintenance of membership. It includes model membership language, as well as a section strongly recommending against including membership terms in CBAs.

Payroll Deduction in the Collectively Bargained Agreement

The payroll deduction of union dues, which requires minimal costs to administer, is a common provision found in CBAs. Having such a provision can temporarily shield (during the term of the agreement) a union from legislation banning PRD, giving it time to implement an alternate system, such as electronic funds transfer (EFT), for collecting union dues. As previously stated, bargaining language should be limited to the responsibilities and indemnification of the employer.
Here is model PRD language:

The Employer agrees to honor the terms of an employee's written, voluntary authorization to have Association dues, fees, and political contributions deducted from their wages. The employee shall authorize deductions using a form created and maintained by the Association and signed by the employee in any manner that satisfies the [State] Uniform Electronic Transactions Act.

Each month, the Association will provide the Employer with a list of the names of employees who have signed a payroll deduction authorization and the amount that is to be deducted each pay period. The Employer shall transmit those deducted amounts to the [local or state] Association [describe timing/schedule]. The Association will provide the Employer with an employee's authorization form, or proof of such authorization if signed electronically, only if there is a dispute about the existence or terms of the authorization.

The Employer will cease deductions from an employee's wages upon the Association's request. If an employee notifies the Employer that they wish to revoke their payroll deduction authorization, the Employer will refer the employee to the Association. Upon an employee's resignation or retirement, the Employer will notify the Association and cease payroll deductions.

APPENDIX C: Payroll Deduction Model Provisions and Bargaining Guidance *(Continued)*

PRD provisions often contain an indemnification clause whereby the union agrees to indemnify the employer if disputes arise over the employer's action in complying with a PRD provision. **If an employer insists on an indemnification clause, we suggest that the local propose the following model language**:

In the event that a current or former member of the [local] Association brings legal action in a court or administrative agency because of its compliance with this provision, the [local] Association agrees to defend such action, at its own expense, using its own counsel, provided that Employer gives immediate notice of such action in writing to the [local] Association, permits the [local] Association to intervene as a party, and gives full and complete cooperation to the [local] Association throughout the legal proceeding, including any appeal. The [local] Association has the right to control litigation strategies and decisions and determine whether any action or proceeding referred to above shall or shall not be compromised, defended, tried, or appealed. This provision will not apply to any legal action that results from the Employer's negligence or willful misconduct.

APPENDIX D:
Negotiating Strong PRD Provisions

(SEPTEMBER 2023)

Since 2010, a number of state legislatures have enacted laws that bar or severely restrict public employers from deducting union dues from employees' wages, including Wisconsin in 2011, Michigan in 2012, Iowa in 2017, and Indiana and West Virginia in 2021. The dam burst open, however, in 2023, when four states—Arkansas, Florida, Kentucky, and Tennessee—enacted payroll deduction prohibitions.

Many critical lessons were learned from efforts to challenge these laws and convert members in those states from payroll deduction (PRD) to AutoPay options (i.e., recurring electronic funds transfers from members' bank accounts and recurring credit/debit card charges).

We know that we cannot rely on the courts to end these legislative threats. Although trial courts in Kentucky and Indiana have enjoined laws prohibiting and restricting PRD (both cases are now pending on appeal), litigation efforts in other states have been unsuccessful. And even if a court strikes down a PRD prohibition, that does not preclude a state legislature from enacting a more carefully drafted bill that takes into account the court's ruling. Accordingly, while a litigation strategy should be considered, and possibly employed to gain additional time to convert members to different payment options, as discussed below, it cannot be relied on to protect PRD moving forward.

Our best hope of minimizing the membership losses from these prohibitions is to ensure that we have strong worksite organizational structures in place and adequate time to execute conversion campaigns. Although the issue of building strong structures is vital, it is beyond the scope of this memo. Instead, we will address the issue of maximizing the time we have to convert members, which can be accomplished by collectively bargaining strong payroll deduction provisions that create a contractual right that will remain in effect through the contract's duration even if the legislature enacts a statutory prohibition in the meantime.

In states that have bargaining rights, where it remains lawful to collect dues through payroll deduction and there is even a remote threat that the legislature could prohibit payroll deduction in the future, we recommend that our state affiliates work with their locals to prioritize bargaining strong provisions that remain in effect for as long into the future as possible.

In prioritizing this work, we recommend focusing first on our largest and most dense locals that have not yet bargained strong payroll deduction provisions before turning to smaller locals and locals that have existing provisions which could be improved.

When it comes to bargaining PRD provisions, locals fit within several categories, which we list in the order they will be discussed below:

1. Locals that have not bargained PRD provisions in their CBAs
2. Locals that have not bargained CBAs
3. Locals that have bargained PRD provisions that could be improved
4. Locals that have previously bargained strong PRD provisions

1. We recommend that state affiliates identify locals in the first category and encourage them to prioritize bargaining strong PRD protections. Locals that have secured a CBA, either through mandatory or permissive bargaining, may be in the best position to create a contractual right to PRD where none previously existed. Locals with CBAs that are set to expire soon can propose a PRD provision when they negotiate a successor CBA. And locals with CBAs that will not expire soon can decide whether to request mid-term bargaining over a PRD provision if there is an immediate legislative threat. Locals can encourage employers to bargain in order to avoid the disruptive effect that a newly enacted PRD prohibition can have on the employer's payroll staff, which often occurs at or near the end of the school year. NEA's model PRD provision, discussed in guidance issued recently by NEA's Collective Bargaining and Member Advocacy Department, is set forth below as Attachment A. Even where payroll deduction of dues has been established by state law, if there is even a remote threat that the legislature could prohibit PRD in the future, we strongly recommend that locals incorporate PRD language into their contracts.

APPENDIX D: Negotiating Strong PRD Provisions *(Continued)*

2. We recommend that state affiliates work with locals that have not negotiated a CBA to explore whether those locals may find success negotiating at least a stand-alone agreement providing a contractual right to the payroll deduction of dues. This will primarily occur in states with only permissive bargaining. Although an employer may be unwilling to engage in permissive bargaining over general terms and conditions of employment, it may nevertheless be willing to enter into single-issue bargaining that merely seeks to maintain the status quo with respect to PRD. As mentioned above, doing so may ultimately benefit the employer, which may want to avoid the disruption created by state laws that end payroll deduction with little notice. To facilitate these discussions, NEA has prepared a sample cover letter and single-issue agreement, which is set forth below as Attachment B. The goal should be to get as long a term as possible on such a stand-alone PRD agreement.

3. For locals that have bargained PRD provisions that could be improved, we recommend that state affiliates help identify how those provisions can be improved, using NEA's model PRD provision (Attachment A) as guidance. The local, during regular or mid-term bargaining, can then propose improvements to the existing agreement. Moreover, the local should seek to bargain a duration clause that leaves the PRD provision in effect for as long as the employer agrees. NEA is aware of locals in permissive-bargaining states successfully negotiating PRD provisions that remain in effect for 5 years or longer even when the rest of the CBA is set to expire in 1 or 2 years.

4. Finally, even when a local has bargained a strong PRD provision, if there is any legislative threat on the horizon, it is worth exploring whether the local could successfully negotiate a lengthy duration clause as discussed above.

For more information, contact Dale Templeton, NEA Director of Collective Bargaining & Member Advocacy: dtempleton@nea.org

ATTACHMENT A

NEA MODEL PAYROLL DEDUCTION PROVISION (SEPTEMBER 2023)

Model PRD Provision

The Employer agrees to honor the terms of an employee's written, voluntary authorization to have Association dues, fees, and political contributions deducted from their wages. The employee shall authorize deductions using a form created and maintained by the Association and signed by the employee in any manner that satisfies the [State] Uniform Electronic Transactions Act.

Each month, the Association will provide the Employer with a list of the names of employees who have signed a payroll deduction authorization and the amount that is to be deducted each pay period. The Employer shall transmit those deducted amounts to the [local or state] Association [describe timing/schedule]. The Association will provide the Employer with an employee's authorization form, or proof of such authorization if signed electronically, only if there is a dispute about the existence or terms of the authorization.

The Employer will cease deductions from an employee's wages upon the Association's request. If an employee notifies the Employer that they wish to revoke their payroll deduction authorization, the Employer will refer the employee to the Association. Upon an employee's resignation or retirement, the Employer will notify the Association and cease payroll deductions.

Model Indemnification Clause—if an employer insists on including indemnification language, we recommend the following:

> In the event that a current or former member of the [local] Association brings legal action in a court or administrative agency because of its compliance with this provision, the [local] Association agrees to defend such action, at its own expense, using its own counsel, provided that Employer gives immediate notice of such action in writing to the [local] Association, permits the [local] Association to intervene as a party, and gives full and complete cooperation to the [local] Association throughout the legal proceeding, including any appeal. The [local] Association has the right to control litigation strategies and decisions and determine whether any action or proceeding referred to above shall or shall not be compromised, defended, tried, or appealed. This provision will not apply to any legal action that results from the Employer's negligence or willful misconduct.

ATTACHMENT B

REPRESENTATIVE CORRESPONDENCE

[LETTERHEAD]

[DATE]

RE:

Dear Superintendent:

We are writing as the representative of the district's [bargaining unit description]. We are asking to [bargain/meet and confer] with the district to ensure that employees may continue paying their association dues by authorizing the district to withhold those dues from their wages and transmit them to the association. Permitting employees to authorize such withholdings is a long-held benefit of employment that ensures that employees retain access to association services and benefits. Specifically, we propose entering into a [contract/memorandum of understanding] that protects the right of the district to extend this right to employees.

We have attached a draft for your review. We would like to find a mutually agreeable time when we can meet to discuss this further. Please contact me at your convenience.

Sincerely,

APPENDIX D: Negotiating Strong PRD Provisions *(Continued)*

ATTACHMENT C

AGREEMENT BETWEEN THE [LOCAL ASSOCIATION] AND THE [EMPLOYER]

Payroll Deduction of Association Dues

This Agreement is made and entered into on this _____, __, 2025, by and between the [EMPLOYER] (hereinafter "___"), and the [LOCAL ASSOCIATION] (hereinafter "Association") as the representative of [describe unit].

1. The Employer agrees to honor the terms of an employee's written, voluntary authorization to have Association dues, fees, and political contributions deducted from their wages. The employee shall authorize deductions using a form created and maintained by the Association and signed by the employee in any manner that satisfies the [State] Uniform Electronic Transactions Act.
2. Each month, the Association will provide the Employer with a list of the names of employees who have signed a payroll deduction authorization and the amount that is to be deducted each pay period. The Employer shall transmit those deducted amounts to the [local or state] Association [describe timing/schedule]. The Association will provide the Employer with an employee's authorization form, or proof of such authorization if signed electronically, only if there is a dispute about the existence or terms of the authorization.
3. The Employer will cease deductions from an employee's wages upon the Association's request. If an employee notifies the Employer that they wish to revoke their payroll deduction authorization, the Employer will refer the employee to the Association. Upon an employee's resignation or retirement, the Employer will notify the Association and cease payroll deductions.

This Agreement shall remain in full force and effect until June 30, 2030.

For [ASSOCIATION]	For [EMPLOYER]
______________________________	______________________________
(NAME) For [ASSOCIATION]	(NAME) For [ASSOCIATION]

APPENDIX E:
Telephonic Conversion Supports

USING TELEPHONIC ORGANIZING TO DEVELOP A COMPREHENSIVE CAMPAIGN

As you make the transition from payroll dues deduction to AutoPay, NEA's experienced tele-organizers are prepared to support affiliates throughout all stages of your conversion campaign—before, during, and after. While telephonic organizing cannot replace the importance of one-on-one worksite conversations, it can provide a crucial surround sound to help facilitate your shift to AutoPay.

NEA recommends that affiliates use the following research-based steps to ensure a successful conversion campaign.

Prior to Your Campaign: Preparing for Conversion Success

To succeed in an AutoPay campaign, prioritize establishing robust communication systems for effective member outreach. **Consider:**

- If your membership contact data is inaccurate, **tele-organizers can update that data.** We will call through your list and help clean out bad information.
- If you need new and innovative ways to identify leaders and activists, **tele-organizers can generate hot leads for you to recruit and train into activism.**
- If you need to alert your members to an upcoming threat of payroll deduction loss, **tele-organizers can relay that message to thousands of members in one night** and prepare them for upcoming asks to convert their dues.

Empowering Success: The AutoPay Conversion Campaign

About 31% of members need up to four one-on-one conversations for a smooth AutoPay transition. Enhance your conversations with NEA tele-organizers for extended outreach at a fraction of the cost. NEA's Telephonic AutoPay Conversion process is streamlined and straightforward to establish.

- **Direct Approach:** Our tele-organizers adhere to a stringent protocol to secure enforceable voice authorizations, safely gather members' financial information, and enter it into NEA AutoPay.
- **SMS Outreach:** Tele-organizers send members an AutoPay link via text, guiding them to execute the conversion on their personal mobile devices.

Continuing the Journey: Post-Campaign Cleanup, Support, & New Member Organizing

The conclusion of any conversion campaign does not mark the end. Successfully managing this transition demands ongoing and time-intensive follow-up work, underlining the necessity for robust workflow processes to sustain affiliate density levels. **Affiliates must establish systems to address the following:**

- Notify members facing credit card/ACH issues
- Educate members about the importance of membership as the conversion date nears
- Deliver final notifications on membership cancellations and union protection loss
- Identify and train leaders for AutoPay campaigns and new member organizing

Cost and Timeline: This service is currently free for state affiliates transitioning from payroll deduction. Affiliates would need to collaborate with NEA Center for Organizing and the Office of the General Counsel for script creation, list compilation, and campaign target identification. Field calls can begin in just two weeks. *For more details or to initiate the telephonic organizing process, contact us at* yro@nea.org

APPENDIX F:
Iowa SEA Rejected Payment Processes

EFT *(Electronic Funds Transfer)*

ACCOUNT CLOSED, PAYMENT STOPPED, OR INCORRECT ACCOUNT

August:

Membership department will email a list of all members for whom we need updated account information.

October/November:

Membership department will email a list of all members that have no deduction gone through yet and need updated account information after each EFT deduction date.

UniServ associate staff steps:

1. Email the members to let them know we need updated information using an email merge that includes the member ID, last four of the account number, their contact info and a link to the EFT website.
2. After 3-5 days, email again to ask for information.
3. If nothing is heard back, then text/call the members.
4. Contact local leaders for assistance.
5. UniServ director to do personal follow-up with members.

If a payment was missed, the members have the following options:

- Have the missed amount resubmitted for payment.
- Make a one-time payment by Credit Card or EFT for the missed amount.
- Spread out over the remaining payments.

Email isea.membership@isea.org to let the membership department know which option the member chooses. Include in the email the member's name and member ID. UniServ associate staff should also add any information and copies of emails from members and staff to the notes tab of the member's profile in IMS. Do not put any account numbers in the notes tab.

If a member has no successful payments for 2 deduction cycles for monthly deductions and 4 deduction cycles for bi-monthly deductions, then the membership department will cancel the membership. The membership department will send a cancellation letter and email and notify the UniServ staff.

For members that had 1 or more successful deduction but now have an account problem, closed account, or payment stopped, the members will have the same options as above. The following steps will be followed:

1. The membership department will email the member.
2. If no response after 3 business days, the membership department will call the member. The member will be notified of when they need to respond before the next missed payment. Voice messages will be left.
3. If no response after 1 business day, the Membership Department will email the appropriate UniServ staff of the members that are not responding and put the email in the notes tab of the member's profile in IMS.
4. UniServ staff should reach out to the member via email, call, text, or asking local leaders for assistance. Information about the contact to the member should be included in the notes tab of the member's profile in IMS. Do not put any account numbers in the notes tab.
5. If the member's information has not been successfully updated after 7 days, the membership department will cancel the membership and notify the member by letter and email, and the staff by email.

APPENDIX F:
Iowa SEA Rejected Payment Processes *(Continued)*

INSUFFICIENT FUNDS

After a rejection for insufficient funds, the membership department will email the member letting them know their payment was rejected. The email will inform the member that we will try to reprocess the payment 2-3 business days after sending the email (the specific date will be included in the email).

If the payment is rejected a second time, we will contact the member by phone to discuss options for paying the missed payment. If they do not answer, we will leave a message with a date of 3 business days to get back to us. If the member does not respond by that date, we will notify the UniServ staff of the members that are not responding.

UniServ staff should reach out to the member via email, call, text, or by asking local leaders for assistance without letting them know it is for insufficient funds. UniServ directors should be involved in contacting the member as well. Information about the contact to the member should be included in the notes tab of the member's profile in IMS.

The member should be given the following options:

- Attempt payment a third time with approval from the member.
- Make a one-time payment by Credit Card for the missed amount.
- Offer to spread out over the remaining payments. Will need to get approval in writing from the member (an email from the member is fine) and will need to send an updated status sheet with the new amount.

UniServ staff should email isea.membership@isea.org to let the membership department know which option the member chooses. Include in the email the member's name and member ID. If the member does not respond, a payment will be run at the next regular EFT deduction date for that member.

If the next regular EFT deduction is missed due to insufficient funds, the membership department will include this on the next EFT reject list that is sent to staff. The membership department will again work to collect that payment by reprocessing the payment as above.

If the reprocessed payment is rejected as well, we will notify the member that they have 5 business days to contact us otherwise their membership will be cancelled. If we are not able to successfully collect payment for either payment (do not have to be consecutive anymore) the membership will be cancelled, and we will notify the member by letter and the staff by email.

**Note: if a member has one unsuccessful payment during the year that we are unable to collect on but has no other issues the rest of the year, the membership department will adjust the State dues accordingly and allow the member to continue.*

CREDIT CARD

Expired Credit Cards:

The first week of August, the membership department will email UniServ staff a list of all active members who have credit cards that are expired or will be expired before October 15. UniServ staff should reach out to the member via email, call, or text. UniServ directors should be involved in contacting the member as well. Information about the contact to the member should be included in the notes tab of the member's profile in IMS. UniServ staff should attempt to get this information updated prior to October 1.

Retired and miscellaneous members who have expired credit cards will be contacted directly by the membership department.

General Rejection/Credit Limit Reached

The membership department will contact these members directly. If any UniServ staff assistance is needed, the membership department will reach out to staff directly.

APPENDIX G: Questions and Ah-Ha's from Three Executive Directors

By: Terrance Gibson, Tennessee Education Association, Mary Ruble, Kentucky Education Association, & Yvette Stennett, Florida Education Association

CAMPAIGN STRATEGY

Build A Statewide & Distributive Conversion Team

- Put together a team to build a statewide conversion plan that can be put into action before being forced by law. **This should include:**
  - A task-oriented point person to lead the team who knows how to run successful campaigns (preferably a Membership Manager)
  - A point person who can direct shared staffing efforts when visiting staff come to help
- You must have a distributive leadership structure to manage the utterly massive number of tasks and deliverables. **Assign specific tasks with specific deadlines to specific individuals.** Hold regular check-ins to keep everyone accountable to the goals of the campaign.
- Division of labor is important and includes data tracking of the campaign's progress, managing changes and maintaining focus, collaborating with staff and local leaders, training organizers and site reps, technical training for using the tools, brainstorming new tactics, and processing any finance needs.
- Strategic and tactical planning at all levels of the organization prepares everyone for the expectations and builds buy-in to a successful campaign.
- As you go through the process, experts in locals will rise to the forefront; engage with them and ask them to help others who may be struggling. (If possible, offer some form of compensation for engaging in significant extra workload.)

Conversion Campaign Strategy

- **This is a straightforward organizing campaign—all of our core organizing principles apply to this effort.** One-on-one organizing principles apply. AHUY principles apply. Preparing as many people as possible to organize is critical and mathematically necessary to tackle the scale of the challenge. Communications and tracking technology are necessary and must be functional and usable, but should be viewed as tools to amplify the work of the people engaged in the campaign, not the means by which the campaign succeeds.
- **You cannot start too early.** Plan ahead. Put the necessary tools in place for dues conversion even if you don't plan to use them immediately. Test your tools and conversion campaign structure on a willing local, preferably one with released leadership and strong building reps.
- Begin the conversion campaign by having officers, then executive boards, and then site reps complete the process. Then move on to the membership. The leadership will then be in a better place to work with members.
- You can expect a maximum of about 7-10% of members to convert using mass communications. All of the others will require a person to engage with them one-on-one to complete the process.
- **Worksite Visits:** When blitzing sites, preparatory communications matter. Emails, calls, Hustles, worksite meetings, and site reps making calendared appointments for conversion meetings all lead to greater penetration and success.
- Capitalize on every possible mobilization event by tying it to the campaign. Remind local leaders regularly to seize these opportunities.
- Identify retirees and other individuals who can be member organizers and boots-on-the-ground volunteers.
- Create MOUs for member organizers/volunteers that outline what the stipends will be and what you are asking them to do.

- Have weekly virtual conversion updates to celebrate wins, share learnings, discuss missteps, and uplift efforts. Creating a space where people can share problems and solutions and others can review and learn is helpful. Microsoft Teams is useful as a repository and collaboration tool.
- **Make sure you have enough appropriate technology** for organizers and staff to use, especially in rural areas with poor internet connectivity.
- **Create an electronic communication strategy** (i.e., Hustle, robocalls, postcards, radio ads, weekly emails, etc.) to go along with your building-to-building canvassing efforts.

> - *Think past the initial conversion push. What will it look like to sign up new members on eDues? When will you move from conversion to recruitment, and how?*
> - *Can you try a voluntary conversion campaign in locals with good infrastructure?*

Worksite Structures are Key to Success

- **Engage and assess your site rep structure leading up to the campaign.** Identify where we have weaknesses to rehabilitate or work around. For state organizations, it is best to power map locals as well and be prepared to focus work on struggling locals.
- Site reps that over-communicated and engaged in a concerted campaign, including mapping and assessing members, moved the campaign more successfully.
- Conversion efforts run more smoothly in buildings that have active and engaged association/building reps.

Engaging & Incentivizing Locals

- Any funding provided to locals should be contingent upon the local's development and commitment to an organizing plan; continued funding should be contingent upon the execution of the plan.
- Know your high-density targeted locals and inform your board about the business aspects of the numbers game (i.e., large locals bring in more dues revenue).
- Think deeply about what the conversion work will look like in smaller locals with weak/non-existent governance/building reps. This is the harder work.
- Create a voluntary conversion program with incentives for the local affiliate, individual members, and/or local leadership.
- **Create a tiered incentive program for the following**:
  - Association/building reps who convert various percentages of their buildings
  - Local presidents whose locals convert at varying percentage levels
- Create a recognition program or competition for equitably-sized locals that can be highlighted at your delegate assembly.

Messaging

- Training leaders is paramount to protecting educators' voices, social justice, and the institution of public education.
- Public-facing messaging must let our members know the threat is real without letting the opposition think they have won or that we are running scared.
- Staff and local leaders must be able to succinctly articulate why a member should stay with our association and convert to eDues. Without that understanding, most members will not convert.

- **You cannot over-communicate.** Ahead of the campaign, provide members with as much information as possible. Because this change involves members' financial information, be prepared to reassure them by providing all of the details.
- Engage in every type of communication at your disposal, but remember that training and empowering site reps is the most important method. Urge locals to make use of all tools available to them, and assist them whenever welcome and possible.
- Hold regular Zoom meetings where locals can raise questions, discuss issues, and share solutions statewide.
- Making campaign materials simple to read with smart graphical flow helps—but remember to have the details available.

Lists & Data

- Months in advance, we began a campaign to significantly improve our communications data for each member. We used programs to identify bad emails and aggressively sought better information. Cell phone numbers are critical to using all our available communication tools. **Site reps were the key to successful data-gathering efforts.**

- *Do you have a current list of your locals from largest to smallest?*
- *How accurate is your member contact data, and how often do you confirm its accuracy?*

Legal Strategies

- *Is payroll deduction outlined/protected in state law or a state policy?*

- Have your legal team work on court strategies without betting that the battle in the courts will be favorable to us. Think carefully about this: litigation will take time and may or may not be successful.
  - Even if you are able to get a temporary or permanent injunction, that probably won't stop the legislature from trying to amend the legislation during their next session.

- *Also, consider the impact of judicially regaining payroll deduction after spending months or years converting members to eDues while awaiting the legal outcome; do you want to waste all that work? Do you want your affiliate's existence to remain vulnerable to legislative whims?*

Engaging NEA

- Work with your Zone Director to request shared staffing through NEA.
- **NEA can and will help.** Reach out. Be specific about what you need and when you need it.

Your Budget

- ✦ Consider the statistics; most state affiliates that are forced into dues conversion lose about 30% of their members after a year. Plan for the impact of that significant loss of revenue. Think about short- and long-term liabilities, member programs, governance structures, staffing levels, building obligations, overall association capacity, etc.
- ✦ Build the increased banking fees from credit card processing into the budget.
- ✦ Get your budget committee/CFO to analyze what your budget would be if you lost 20%-30% of your income. Discuss what programs and how many staff positions would be cut if such a loss occurs.

> - *How long could your operations survive if payroll dues deduction ceased as an option?*
> - *Decide what programs, activities, or association events should be cancelled or delayed during the crisis. Be realistic: What must you continue doing? What should you continue doing, and what adjustments must be made? What should you stop doing entirely?*

Dues Collection & Banking

- ✦ Design a plan to absorb the new/unanticipated work of tracking down insufficient fund payers and credit cards that expire.
- ✦ **Set a hard deadline of November 30 to drop all those who have yet to convert.** Members can only use the eDues portal if their record is "active" in NEA360/IMS. Using the eDues portal is quick, easy, and much preferable to signing them up as new members.
- ✦ Keep close track of the number of members who have not converted, and work with NEA Finance to support your timely request to have the uncollectible dues written off. Keeping members who have not converted in NEA360 as "active" means your member numbers will be overstated and the affiliate will continue to be liable for the portion of NEA dues from members who are being counted but are not actually paying dues.
- ✦ Make sure every local has every payroll schedule collected and ready to implement as an eDues schedule if you are trying to align the deduction with pay dates. We did this to minimize occurrences of Insufficient Funds fees for our members.
- ✦ If you are using your own eDues processing system or working directly with a bank, be aware of reclaimed funds that can be taken back for up to 60 days after a draft succeeds. **This can be because of stop payments and other scenarios like the following:**
  - R05 – Unauthorized Debit to Consumer Account Using Corporate SEC Code
  - R07 – Authorization Revoked by Customer
  - R10 – Customer Advises Originator is Not Known to Receiver and/or Originator is Not Authorized by Receiver to Debit Receiver's Account
  - R11 – Customer Advises Entry Not in Accordance with the Terms of the Authorization
- ✦ **Train staff as dedicated resources for an eDues issue help desk (both phone-based and email-based):**
  - Cross-train both functional and technical staff to help
  - Dedicate shared mailboxes for eDues support
  - Dedicate a phone hotline
  - Consider using a chat agent/bot (we did not do this, but it would have been helpful if we had the resources to)

- *How many members do you currently have on eDues, and who monitors the process and collection of eDues?*
- *What are your relationships with financial institutions that could serve as your dues repository?*
- *Does your affiliate collect dues centrally (all dues go to the state affiliate and then back out to locals), or does each local collect and remit to the state affiliate?*
- *Do you want to allow the use of credit cards for dues payments? (Higher fees for each transaction but some members like the option to get rewards.)*
- *Does your affiliate have a sub-account with Bank of America? (NEA has an enterprise agreement with them for dues collection, but each affiliate must establish a separate sub-account.)*
- *If you aren't using eDues, how will you collect individual member financial data, and how will you keep it secure?*

IMS, NEA360, & Join Now

- *Are you on the Join Now platform? If you aren't on Join Now, how will you sign up new members, collect their financial data, and keep it secure?*
- *Do you use NEA360/IMS to maintain your membership data?*
- *If you use NEA360/IMS for membership data, have you considered your custom settings in eDues (affiliate branding, payroll schedule options and programming, local dues amounts, credit card options, etc.)?*

LEADERSHIP

Governance Engagement & Policies

- ✦ Understand the internal concerns of moving from payroll deduction to eDues.
- ✦ Develop policies and procedures at the state and local levels to deal with how eDues work. Some areas may not have been needed in the past—for example:
  - How many failures to draft union dues before a member is placed in bad standing (i.e., cancelled or dropped as a member)? Is this automatic?
- ✦ Do a board presentation on the looming threat and potential organizational impact. Plan for and address any internal barriers (constitutional, bylaw, policy) that restrict dues collection methods or processes.

- *Do your governing documents speak to the issue? What changes may need to be addressed in the documents?*

Staff Management

- *Does your membership staff have a strong understanding of NEA360?*
- *Are your staff seniority lists accurate?*
- *Do your staff contracts have language on layoffs/RIFs?*

Leading During Crisis

- ✦ Change is hard. Change in crisis is harder.
- ✦ Do not panic. Be deliberate. Focus your fully-staffed conversion efforts on your largest locals to move the most members as quickly as possible.
- ✦ **Consider morale.** Expect and plan for anxiety among staff (and their significant others):
  - Find ways to keep morale up, especially for those at the bottom of the seniority list
  - Share positive messages from the president and executive director: "We will grow through this attack"
  - Have a staff meeting to discuss the Storming, Forming, Norming, and the unanticipated that will occur during the conversion process
  - Assure members that we are fighting for the legacy of the organization
- ✦ Membership is everybody's business!
  - It is imperative that ALL staff be engaged in the conversion effort—make it part of your weekly/daily updates and briefings.

?

- *Do you expect your building staff and managers to be in the field/buildings at least two days a week, more, etc.?*
- *How and how often will your board reach out to local officers to motivate them on the urgency of the conversion campaign?*

- ✦ Leaders must take time to check in on the wellness of those helping move the campaign and each other. The stress level is significant and takes a toll.
- ✦ It is critical to build a mindset that leaders and staff do not say "no" to others. We must give every idea an opportunity in this moment.
- ✦ **Publicly celebrate successes, no matter how small: they motivate.** Our field team begins each and every meeting with an opportunity for everyone to share wins.
- ✦ Mentally prepare everyone for plateaus in your campaign. Prepare strategies and tactical changes to rebuild momentum.
- ✦ Everyone needs to be prepared to give each other some grace—the massive changes will be difficult to navigate cheerfully. Regularly remind everyone of this.
- ✦ **All hands on deck. Communicate with staff often. Additional staff WILL BE NEEDED.** Job assignments will change dynamically when dealing with the implementation of eDues, especially in an emergency scenario.
- ✦ Leadership must actively communicate the top-down decisions and directions of the state affiliate.
- ✦ Organize around a core mission and set goals as a state organization. It's impossible to take every local's desires into account—clearly communicate a firm direction.

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