

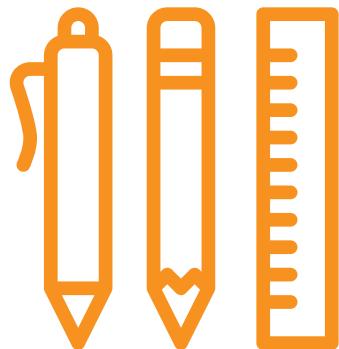
NEA's Guide to Worksite Visits

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The National Education Association (NEA), the nation's largest professional employee organization, is committed to advancing the cause of public education. NEA's three million members work at every level of education – from pre-school to university graduate programs. NEA has affiliate organizations in every state and in more than 14,000 communities across the United States.

Thanks to the following affiliates for their generous sharing of materials and guides:



- ▶ Maine Education Association "Blitz Guide"
- ▶ New Jersey Education Association "Conducting Successful Worksite Visits"
- ▶ Michigan Education Association "Get in the Green"

Objective 1: Identify the Local Association

The goal of a worksite visit is to have one-on-one conversations and/or group conversations with as many members and potential members as possible. Through these conversations, our goals can be to:

- ▶ Recruit Potential Members
- ▶ Engage Current Members
- ▶ Identify Potential Issues to Organize Around
- ▶ Identify Potential Activists
- ▶ Identify Potential Leaders
- ▶ Update Member and Potential Member Contact Information



Objective 2: Collaborate with Local Leaders & Staff

A best practice for worksite visits is that we must coordinate with local leadership and worksite leaders prior to conducting a visit.

► **Secure Commitment from the Local President and Executive Board:**

Commitment from the local association to conduct the blitz or worksite visit is essential to long-term capacity- and skill-building. If possible, local leadership should take responsibility for the following actions:

- Participate in the blitz or worksite visit themselves
- Work with assigned State and NEA staff to secure building access and confirmation from district administration, including building principals
- Work with worksite leaders to remind the building principal and head secretary of the upcoming building visit
- Work with worksite leaders to inform targeted employees of upcoming building visits, including purpose and any incentives for participating

► **Meet with State Staff:**

Ask assigned staff (*Organizers, UniServ*) to work with the local association to:

- Secure union (*or union-funded*) release time for local leaders to participate in the blitz or worksite visit
- Secure building access and obtain confirmation from district administration, including building principals
- Ensure communications are sent to building principals, secretaries, and targeted employees

► **Meet with Worksite Leaders:**

Worksite leaders can alert us to issues that may arise, intel on the relationships with administrators, and special circumstances to be aware of that may facilitate our success. They can also help confirm building or worksite access. Worksite leaders should help with getting a list of the planning, break periods, and/or office hours of the targets. It is best to simply get the master schedule for each school (*every school has one!*), obtain a physical map of the school or worksite with room numbers and employees' names, get a list of the start and end times of the student day and start and end times for each employee in the targeted group(s), and ask them to participate in the blitz!

Objective 3: Draft a Plan

A draft plan should describe your overarching approach. Aim for a few paragraphs or one page that will give you and your team a high-level understanding of the worksite, a pathway to reaching your goal, and the kind of blitz you're going to run.

Be sure to answer the following questions:

- ▶ **Define the Goal:** What is the goal of the blitz (*membership recruitment, leadership ID, issue identification, PAC membership, all of the above?*)?
- ▶ **Assess Needs:** What are the needs of the local association?
- ▶ **Define Targets:** Who are the primary targets? Secondary targets? (*e.g. new hires, potential members with 0-4 years of experience, special ed. assistants, etc.*)
- ▶ **Logistics:**
 - Will the conversations occur during the day? Before/after school? Home visits?
 - Will you use Hustle (text) or phone banks?
 - Based on your universe (# of targets), for how many days will you conduct the blitz?
 - What is the best date span for the blitz? Check for date conflicts with the school system and the community.
- ▶ **Assess Local Capacity:** How ready, willing, and supportive is the leadership team? What are the worksite leaders' structure and strengths?
- ▶ **Assess Staff Capacity:** Plan staff accordingly. Do you need to request shared staffing help from other regions? Other states?
- ▶ **Need for Member Organizers/Release Time:** Based on the goal(s), how many member organizers and staff are needed?
- ▶ **District/Principal Buy-in Approach:** Meet/confer with the superintendent and/or principal to explain goals for the blitz and get buy-in from the district. Have an alternative plan if the district is not cooperative.
- ▶ **Data Gathering:** Make a plan to use VAN or NEA360 to house the data during or after the blitz.

Objective 4: Clean and Analyze Your Member & Potential Member Data

The most successful worksite visits have plans for acquiring member and potential member data before, during, and after the blitz. Be sure to collect and analyze the following data:

- What is the worksite density? How many members work in this worksite?
- How many potential members work in this worksite?
- Who is/are the worksite leader(s)?
- Has this building been mapped?
- Do we have a worksite roster?
- What is the workday schedule? When are members' lunches and when are their prep periods?
- What issues are we currently addressing in this local or worksite?
- Have members been notified that we are coming to the worksite?

Objective 5: Prepare Ahead

Before you bring the entire blitz team together, make sure you prepare the following:

- ▶ **Create a Schedule for the Week:** Make sure you include pre-blitz training and a daily debrief schedule. Add special events, phone banks, and house visits as necessary.
- ▶ **Assign Partners and Turf:** Who will you partner together based on strengths? Which worksite(s) will they visit?
- ▶ **Check to Ensure Building Visit Information has been Communicated to:**
 - Building principals and secretaries
 - Worksite leaders
 - Targeted employees
- ▶ **Create Your Training. Make Sure You Include:**
 - Overview of local association/community (*ideally from Local Association President*)
 - Short briefing on state affiliation and statewide issues
 - Orientation to the blitz
 - Review "Worksite Visits: The Basics" (See Worksheet 1)
 - Goals (*as listed in your plan, Objective 3*)
 - Tools to achieve goals and membership recruitment techniques
- ▶ **Create a Walk List for Participants:**
 - If you are conducting a blitz during the day, create a daily schedule based on planning period/break times.
 - If you are conducting a blitz before and after school, simply create a list of targets (*by school, by section of the school, with knowledge gathered from the worksite leader on informal schedules – who comes in early, who stays late, etc.*).
 - Determine whether you will use VAN or NEA360 to pull the lists. Will you use mini VAN?
 - For larger districts with multiple buildings, it may be helpful to print a Google map with all the building locations, and identify a few local businesses that are good places to regroup between sessions (*nearby, with WiFi and room to spread out*).
- ▶ **Prepare Materials for Participants:**
 - Canvass packet
 - Names and addresses of schools they are visiting (*include principal/lead secretary*)
 - Building maps with room numbers/names
 - Worksite leader/Executive Board contact information for each school
 - Conversation tracking sheets and daily reporting forms (*see Worksheet 3*)
 - Conversation Guide/Script (*see Worksheet 2*)
 - Brief background on local association: major issues, challenges, successes, etc.
 - Contact information for lead organizer(s) and local presidents
 - Provide a bag, large envelope, or binder to contain these items.
 - Membership forms, New Ed cards, commitment cards (*volunteer tracking*), and brochures about the work and agenda of the local association
 - Pens/post-it notes to leave "sorry we missed you!" messages for educators OR pre-printed "sorry we missed you!" cards with contact information for organizers
 - Copies of "10 Reasons to Join" and other membership recruitment materials
 - Pens
 - Clipboards

Objective 6: Have a Daily Debrief Schedule

- ▶ Debrief with organizers daily (*chart # of new members, # of one-on-ones, # of new leaders/activists, issues at sites, necessary follow-ups, etc.*)
 - ▶ Have organizers share stories from the day (*build challenges, competition, etc.*)
 - ▶ Include local association officers when possible
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Objective 7: Have a Post-Blitz Plan

- ▶ **Debrief with Organizers:**
 - Ask for feedback and suggestions
 - Determine a time and place, and secure commitments from organizers before the blitz begins
- ▶ **Debrief with the Local:**
 - Include local UniServ staff and officers
 - Share results and plan next steps
- ▶ **It is best to block off several days to a week after the blitz for compiling data and follow-up planning with the Local.**

OTHER CONSIDERATIONS:

- ▶ Blitzes are great and may be most effective as a jumpstart to a longer campaign.
- ▶ Be prepared to shift and change the schedule; you may have more or fewer conversations than anticipated.
- ▶ Be prepared to consider home visits or other ways of contacting your targets.
- ▶ As the lead organizer, you will want to figure out what your role will be – will you be out in the schools? Will you collect the data and rework the lists as the blitz progresses? A combination of the two?
- ▶ Do the organizers participating have special talents or skills that might aid the process? Stay open to what is possible when engaging in the blitz.

WORKSHEET 1

Worksite Visits: The Basics

The goal of a worksite visit is to have one-on-one conversations and/or group conversations with as many members and potential members as possible. Through these conversations, we hope to:

- Recruit potential members
- Engage current members
- Identify potential issues to organize around
- Identify potential activists
- Identify potential leaders
- Update member and potential member contact information

WHAT TO KNOW BEFORE YOU GO:

1. How many members work in this worksite?
How many potential members?
2. How many potential members work in this worksite?
3. Who is/are the worksite leader(s)?
4. Has this building been mapped?
5. Do you have a worksite roster?
6. What is the workday schedule? When are members' lunches and when are their prep periods?
7. What issues are we currently addressing in this local or worksite?
8. Have members been notified that we are coming to the worksite?

WHAT TO DO WHEN YOU ARRIVE AT A WORKSITE:

1. Make sure you have parked in a school visitor parking space.
2. Show ID upon arrival. Sign in with the front desk and introduce yourself to the front office staff. Identify yourself as being with the union.
3. Consider providing a small gift or thank you note for the front office staff to show appreciation for their assistance. This can pay off later in list acquisition and data updating.
4. Ask the front office for an updated worksite roster, schedule of lunch periods and preps, and a building map.
5. Ask the front office which members are out of school that day.
6. If appropriate, ask if you can introduce yourself to the principal or administrator.
7. Ask if and where there is a union bulletin board. Visit the bulletin board to see how recently it has been updated. If it hasn't been updated in a while, make a note to discuss this with the local president.

FOR VISITS DURING MEMBERS' PREP TIME:

- ▶ Try to schedule visits in advance of your arrival.
- ▶ Introduce yourself and let the member know where you will be when you aren't conducting the scheduled one-on-one conversation. Invite the member to come visit you.
- ▶ If the member is busy and can't talk at all, leave a note in the member's mailbox letting them know you came by to speak with them about the union. Leave your contact information.

WORKSHEET 1 (CONTINUED)

FOR LUNCH VISITS:

1. Set yourself up in the location where most targets eat.
2. Make sure you have a sign-in sheet that collects member and potential member contact information, including cell phone number and personal email address.
3. Introduce yourself using one-on-one conversation best practices.
 - a. Get their name, what they do at the school, and ask if they are a member (*reference walk list*).
- b. Share information regarding association priorities as they relate to the Local and the specific worksite.
- c. Ask open-ended questions to get the member/potential member's story.
- d. Ask the member/potential member to do something (*sign a petition, fill out a postcard, sign a membership form, contribute to the PAC, etc.*).
- e. Identify potential issues to organize around.
- f. Identify whether the member/potential member is an activist, leader, etc.

WHAT TO DO BEFORE LEAVING THE WORKSITE:

- ▶ Collect all the materials you've put out that are not to be left behind.
- ▶ Clean up any food you may have brought with you. Remember, the custodial staff are our members, potential members, or another union's members. We must ensure we aren't creating additional work for them.
- ▶ Stop by the front office and sign out to ensure there is documentation of your departure.
- ▶ Thank the front office staff for their assistance.
- ▶ Say goodbye to the principal or administrator. If it's a friendly relationship, thank them for their support for our members.

Conversation Best Practices

1. Get their name, what they do at the school, and ask if they are a member (*reference walk list*).
2. Share information regarding association priorities as they relate to the Local and the specific worksite.
3. Ask open-ended questions to get the member/potential member's story.
4. Ask the member/potential member to take an action (*sign a petition, fill out a postcard, sign a membership form, contribute to the PAC, etc.*).
5. Identify potential issues to organize around.
6. Identify whether the member/potential member is an activist, leader, etc.

WHAT NOT TO DO:

- ▶ Never use the students' restrooms. ALWAYS ask to use the faculty restroom.
- ▶ Do not take photos without members' permission. NEVER take photos of students.
- ▶ Do not park in a faculty parking space. Often, there is limited parking and we do not want to take parking spaces reserved for our members and potential members.
- ▶ Do not park in front of the school unless designated for school visitors.
- ▶ Do not third-party the union: The union is not a separate entity. The members are the union. Our union must be healthy, strong, and ready to win. This happens when members own their union.

WORKSHEET 2

Example Conversation Guide/Script

Name: _____ Position: _____

Subject: _____ Years in building: _____ District: _____

Organizer: _____

How's your year going?

What do you love about your job?

What makes it difficult for you to do your job/teach as effectively as possible?

What is the most important issue in the school (or district) to you as an educator?

WORKSHEET 2 (CONTINUED)

What do you need to be a more empowered and effective educator? In your opinion, what does that look like?

Besides your worksite leader or union officer, who would you say are some of the most trusted and respected staff here in this building?

NAME:

WHY DO THEY COME TO MIND?

ADDITIONAL QUESTIONS FOR POTENTIAL MEMBERS:

What have you heard about the [Insert State/Local/NEA]? Can we count on you to join? (If not, what's holding you back?)

Example Daily Tally Sheet

Name: _____

Date: _____

PLEASE SHARE ANY INFORMATION ABOUT YOUR CONVERSATIONS, INCLUDING WHAT FOLLOW-UP IS NEEDED.

SCALE: 1 = Activist 2 = Supporter 3 = Unsure/Uncertain 4 = Leans Opposed 5 = Opposed

*Be sure to return this daily to: _____ at _____

