

NEA NEW EDUCATOR CAMPAIGN

training template



2018

The National Education Association is the nation's largest professional employee organization, representing 3 million elementary and secondary teachers, higher education faculty, education support professionals, school administrators, retired educators, and students preparing to become teachers.

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PDFs of this guide @ <https://goo.gl/5geC9V>

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HOW TO USE THE NEW EDUCATOR CAMPAIGN WORKSITE REPRESENTATIVE TRAINING TEMPLATE

PDFs of this booklet, as well as each of the 5 modules, can be found here: <https://goo.gl/5geC9V>

Background: This guide is designed to be utilized by Local Presidents or Uniserv Directors when training building or association representatives to prepare them to conduct a successful New Educator Campaign. For an extended Train-the-Trainer for your staff or governance, contact Matthew Bennet at mbennet@nea.org

Module 1: Worksite Checkup

As the visible manifestation of the union for new educators, it is essential that worksite representatives understand their role in supporting and recruiting new educators. This training is designed for building representatives to fill out as an expectation of roles and to spark discussion. In well-organized local associations, building representatives are part of the local's distributive structure of communication, contract enforcement, new member recruitment, and resource distribution.

Module 2: Talking to New Educators & New Hires

1:1 conversations with new hires are essential to building their relationship with the local union and gathering data on the potential member with the New Educator interest card. This training provides a framework for locals to train their worksite representatives for authentic organizing conversations with a new hire in their building, incorporating reminders on educating the new member on the union, active listening, and making the ask for membership.

Module 3: Membership Asks

Recruiting and retaining membership is an essential part of building power for your members. To make a strong membership ask, local leaders must understand the heart of their organization, or its "why?", and the head of their organization, or its "what?". Participants should end this training with a thorough understanding that their association exists because excellent and committed educators demanded a voice at their workplace to advocate for their students.

How to train, short explanation

The Why of Membership: The training should start with Simon Sinek's "Start with Why" video (YouTube search for short edited version) to move the trainees away from asking potential members to join with responses around the tangible benefits of union membership to inspiring others to join around the ideals of a collective educator voice, professional respect, and advocacy for a high-quality public education for all students regardless of zip code.

BRAG About Your Union: The training should begin with trainees discussing each box of the BRAG in small groups for 15 minutes. Facilitator should allow for five minutes of share out by letter so participants can discuss it.

Module 4: Dues & Tough Questions

It is essential to understand and explain our unified membership dues structure to new potential members. This training provides the local leader or staff with best practices around asking questions related to dues so that it is properly messaged and transparently explained. A calculator is provided for the addition of state and local dues calculations. This module also provides a page for explaining the NEA's dues spending for potential members, including the calculation for how much of their dues are sent back to state and local affiliates to fund Uniserv Director positions (\$52.04 in 2018).

Module 5: Mapping

Being able to discern trends and patterns in your worksite is an essential tool for worksite representatives. This training leads building leaders through a basic module designed to chart their building on a worksite roster and an advanced module to visually chart their worksite.

**For an extended Train-the-Trainer for your staff or governance, contact Matthew Bennet at mbennet@nea.org

MODULE 1: WORKSITE CHECKUP

What Does a Well-Organized Worksite Look Like?

The Association is visible in the worksite to members and administration.

- Association Representatives or Association Leaders make regular walk-throughs and have relationships with all members and potential members.
- There is at least one Association Representative in every worksite.
- Membership meetings happen regularly, are well-attended, and noticed by others.
- Association Leaders attend every new-employee orientation.
- There is regular communication through up-to-date bulletin boards, member-to-member communication, flyers, and newsletters.

The Association defends and enforces the contract and work standards.

- Members mobilize and use collective action to solve everyday problems. Grievances are not the primary line of defense.
- Contracts are widely available and promptly distributed, both electronically and in print.
- Association Representatives are trained and empowered to resolve issues at the lowest level.
- Administrators do not act unilaterally or abusively, because they know they will meet resistance.

Members own their union.

- Members feel that their Association is strong and resolves problems.
- Association Representatives provide members immediate access to resources to resolve their problems.
- Members participate in Association-wide programs and campaigns.
- Members are proud they belong to the Association.
- Social events are well attended.

MODULE 1: WORKSITE CHECKUP

Give Your Worksite a Checkup

Rate each statement with this scale.

A. The statement is very true of your worksite.

B. It's mostly true.

C. It's true, in some areas.

D. It's barely true, or not true at all.

- Association Representatives or Association Leaders make regular walk-throughs and have relationships with all members and potential members.
- There is at least one Association Representative in every worksite.
- Membership meetings happen regularly, are well-attended, and noticed by others.
- Association Leaders attend every new-employee orientation.
- There is regular communication through up-to-date bulletin boards, member-to-member communication, flyers, and newsletters.
- Members mobilize and use collective action to solve everyday problems. Grievances are not the primary line of defense.
- Contracts are widely available and promptly distributed, both electronically and in print.
- Association Representatives are trained and empowered to resolve issues at the lowest level.
- Administrators do not act unilaterally or abusively, because they know they will meet resistance.
- Members feel that their Association is strong and resolves problems.
- Association Representatives provide members immediate access to resources to resolve their problems.
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MODULE 2: TALKING TO NEW EDUCATORS & NEW HIRES

TIPS for the Basic Organizing Conversation

The Millennial generation grew up with a barrage of advertising and media spin. Thus, they are primed to recognize authenticity. Nobody should follow a script mechanically, of course. Talk with people like human beings! But think of this outline and script as a tool. These steps can help you move towards the goal, so your colleague isn't left feeling like their time's been wasted with a spiel or gripe session. Done right, an organizing conversation leads to action.

Your job is mostly to ask questions. You want your colleague to realize:

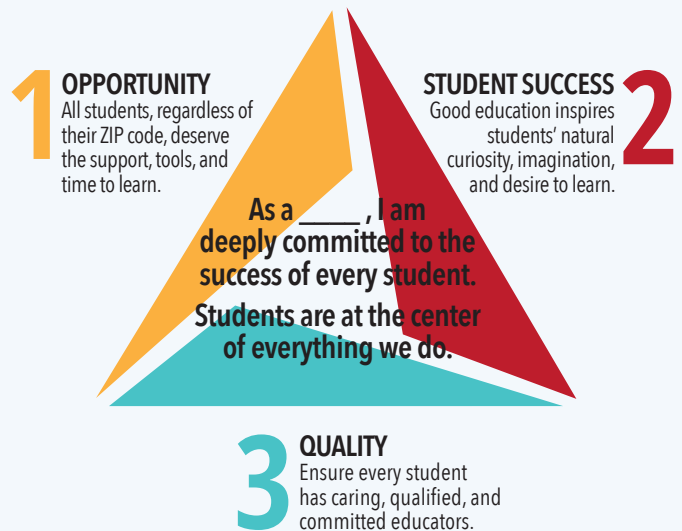
- They care about a problem
- There are tools to fix this problem
- If your colleague really wants these challenges fixed/solved, they have to join you and your other colleagues in taking action and joining the association.

Discover the ISSUES:

Begin by asking questions—and listening to the answers—to learn what your new colleague cares about. Make your questions open-ended, especially when you are getting to know someone. When organizing around a particular issue, your questions may get more pointed. Still, even if you are dealing with a very pointed single issue, don't leap straight into "Will you sign this?" Instead, ask: "What are you most anxious about at the start of the year?"

The point is for your colleague to state what they are concerned about before you ask them to act. If you've discussed this issue before, you can still ask how it's affecting them today, or share someone else's story and get their reaction.

The NEA Message Frame: An Association Committed To Student Success



AGITATE—Go deeper on the issue:

React to what they tell you, and ask follow-up questions. By reacting, it allows them to feel they have permission to be angry or anxious, etcetera.

- The beginning of the school year can be daunting for all of us. What kind of questions do you have now?
- What are you most excited about?
- What are you most anxious about?
- Why did you choose to work at your school?

MODULE 2: TALKING TO NEW EDUCATORS & NEW HIRES

continued

Educate/Build a Vision—The Union Difference:

Now that you've begun to know their story, it is time to offer them hope. Hope comes from your power in numbers and a winnable plan. You could say something like: "Let me tell you about our union because I think you will find it a great place to connect with other educators from across the district: (recent victory, proudest movement, what we won recently, who the union representative is). That is what it means to act like a union. It is us coming together to change things that need to be changed, and secure what is going well. Does that make sense?"

Call the question—MAKE THE ASK

Ask the new educator to be a part of the solution by taking a specific action. For this campaign, the specific action is the interest card and membership.

Helping them through this will be a lot easier when you're inviting them to action on what they've already said—not pushing an action you're trying to "sell."

Set follow-up plan:

Agree on the next step, and when to check back in. Maybe they are going to meet you Thursday to go to a membership meeting, or maybe they'll talk to two colleagues about filling out the interest card and membership form.

Remember, you're not trying just to pull off this one action. You're also trying to draw people gradually closer to the center and build an ongoing network of communication. You're trying to make standing up, in an organized way, a normal and natural part of workplace life.

Reminders on Active Listening

- ✓ **Avoid Distractions.** Look the other person in the eye, and put your phone away.
- ✓ **Slow Down.** Our brains process thoughts four times faster than spoken words. It's easy to skip ahead in a conversation, using your assumptions to fill in the gaps and plan your response. RESIST this urge. Focus on what is actually being said.
- ✓ **Do Not Interrupt.** Take the time to hear the full story.
- ✓ **Keep an Open Mind.** Don't assume you already know what someone cares about just because they are a millennial. People will surprise you.
- ✓ **Do Not Fish.** Avoid leading questions like "Don't you agree that..."
- ✓ **Practice Empathy.** Sometimes people need to let off steam. Don't discourage them. Your immediate task is to hear what they have to say, NOT to judge.
- ✓ **Show that you hear what they are saying.** React, ask follow-up questions and repeat back what you understood. If you don't understand, ask.
- ✓ **Find Common Ground.** You don't have to agree with every point, but look for areas of agreement, and acknowledge where you differ.
- ✓ **Don't Feel You Need to Sell Something.** An organizer is not a salesperson. You're genuinely looking to learn the other person's point of view and create something new together.

MODULE 2: TALKING TO NEW EDUCATORS & NEW HIRES

1 to 1 Conversations with New Educators (“ISAHUEY” Model)

Link to NEA 1:1 conversation video: <https://www.youtube.com/watch?v=WY0usX7IIZo>

Introduction

Who are you? Why do you want to talk?

Story/ Issues (Elicit their values and purposefully share your own)

(80% Listen/20% Talk) Share your story, ask questions and prompt reflection “Why did you become an educator? What do you love about this work? How did you come to be here?”

“What are you most excited about for this school year?”

Agitate

Validate their issues.

“I understand that.” “How does that make you feel? Is that frustrating?” “What is the impact on you? Your students? Your family?”

Hope/ Vision of the Union/ **P**lan to Win

Why is the UNION the solution?

What can we collectively do together to fix the problem?

Urgency

“Clearly, these issues aren’t going to change on their own...it’s time for people like you who really care to start leading a change. The longer we wait, the worse it gets. What’s the impact of doing nothing?”

Educate

Explain what’s being done (or what can be done) to address or work on these issues. Educate them about the union, such as: mission, vision, purpose, dues, victories, benefits, etc.

Your Ask for Commitment → Call the Question

Don’t beat around the bush: Ask a Yes or no question!

Non-members → Will you join the only association fighting for educators and our students?

Members/ Supporters → Give them assignments

“With your help, we can make a change...but we can’t do it without you.”

“Are you ready to take action to move a positive change forward?” (e.g.—meet again to continue discussion, join the union, sign a pledge card committing to further action, etc.)

Other Reminders

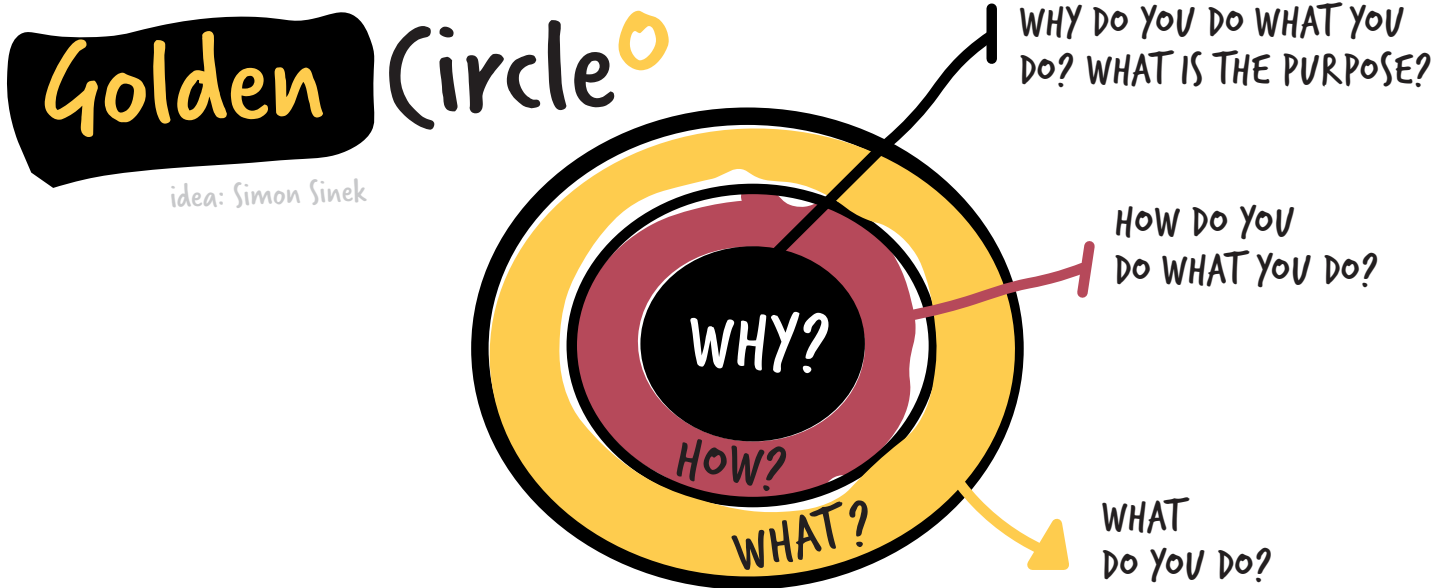
- Creating tension / Uncomfortable silence (Count to 10)
- Listen 80% / Speak 20%
- Follow Up: How? When?
- Identify Leaders

MODULE 3: MEMBERSHIP ASKS

What is Your Why?

Show this video before starting this portion

Simon Sinek—Start with WHY: <https://www.youtube.com/watch?v=IPYeClTpxwn>



What's my why? Why did I become an educator?

Light blue rectangular area for writing the answer to the question above.

What's my union's why?

Light blue rectangular area for writing the answer to the question above.

MODULE 3: MEMBERSHIP ASKS

B.R.A.G. Sheet

Benefits

What are the advantages of membership in our union? (i.e. A collective voice for public education)

Resources

How does my union support me and help me be the best educator I can be?

Achievements

What have we achieved that makes a difference in the lives of my students?

Goals

What achievements are we (or should we be) working to accomplish that will make a difference in the lives of my students?

MODULE 4: DUES & TOUGH QUESTIONS

Explaining Your NEA/SEA/LEA Unified Dues

It is essential to understand and explain our unified membership dues structure to new potential members. The calculator below can be used to calculate a new member's dues.

When answering a potential member's questions about paying dues...

- ✔ **Know your total dues amount but explain in cost per-pay-period or interval.** "Our dues are \$32 a pay period."
- ✔ **Understand the methods for payment in your local area and state.** (Payroll deduction, e-dues, check, credit card, etc.)

NEA Dues Fact Check

- Dues are a collective investment and a way to build power for working educators, not a burdensome expense. Unionized educators enjoy higher wages, and on average, have better health insurance, pensions, and job security than do unorganized educators.
- NEA doesn't set the dues. Only delegates to the NEA Representative Assembly, who are elected by our local or state association can vote to increase our dues. States set their dues at their State Representative Assembly and likewise for locals at their local annual meeting.
- Almost 30% (\$52.04) of NEA dues are returned to states as Organizing and Operational Support to our Affiliates, including the partial funding of all UniServ/Field Representative salaries.

	Certified Full-Time Professional		Education Support Professional (ESP)	
	Cost	Per Pay Period	Cost	Per Pay Period
NEA	\$192		\$116.50	
+				
State EA				
+				
Local EA				
=				
Total Cost				

Dues for the 2018-2019 school year

MODULE 4: DUES & TOUGH QUESTIONS

Answering Tough Questions: Affirm-Answer-Redirect

For this exercise, have trainees brainstorm the reasons people don't join the union and then chart it in small groups. Second, have the groups develop their answers in the format below: "Affirm—Answer—Redirect" Conversations often don't go exactly the way we had initially planned and that is ok and normal. It is important to keep the focus on your message. When people come to you riled up over the spin from education reformers or management, a good way to respond is "Affirm—Answer—Redirect."

Affirm: Let them know you're listening, you understand, and their feelings are valid. Your new colleagues may be scared to speak up or upset by what they've heard. Many have grown up without unions and have internalized the negative misconceptions about unions. Don't get mad at them—validate and educate them.

Answer: Give a truthful, concise answer to the question. Do not be evasive or your entire message will be lost. If there is a grain of truth to the message, say that up front. If you don't know the answer, don't guess. Tell them you'll find out and get back to them. Make sure you follow through, to maintain trust.

Redirect: Once you've answered the question, don't get bogged down in too much back-and-forth about it. Instead, be ready with a question that brings the conversation back to your message. Below are some simple answers to tough questions. You can use these or other answers you feel are more appropriate, but follow the process of affirm, answer and redirect.

QUESTIONS	AFFIRM	ANSWER	REDIRECT
Dues Costs: "I don't think it is worth being involved with the union because dues are so expensive."	I can understand why you would be concerned about dues.	The dues are _____. The way our dues work is _____.	There are two ways that we get our power as a union. Money and people.
Free Riders: "Why do I have to join? Because I do get the benefits without paying for it."	I can understand why you would feel that way.	Currently, (% of members) of our colleagues pay dues to fund the bargaining of our contract.	As you know, we are trying to solve (insert issue here) this year and our association is working hard to make sure we are able to function as professionals in our work. Since we agree on that, we need everyone involved to win this fight. Will you join?
Bad/Lazy Workers: "I have heard that unions have members who are incredibly lazy or bad teachers. Why would I be involved with a union that is just going to protect bad educators?"	I can understand your concern.	A union can't protect anyone that is unable or unwilling to do their job. It is simply about having a fair set of rules that apply to everyone.	There is a process of handling those unable or unwilling to do their job. It is a distraction to talk about the union protecting lazy workers rather than the issues that concern us. (Specify an issue you have heard.)

MODULE 4: DUES & TOUGH QUESTIONS

Answering Tough Questions: Affirm-Answer-Redirect *continued*

QUESTIONS

Futility “Why should I be involved with the union? The union can’t do anything about classroom size.”

AFFIRM

I can understand your concern. Classroom size can be a challenging issue to address.

ANSWER

In fact, union members have been able to get classroom size language into many of their contracts.

REDIRECT

Right now that is a decision that is solely up to management. As a union if we fight together we can have a voice in decisions around classroom size. We deserve to be a part of the process.

Strikes: “My superintendent told me the only weapon that the union has to get good agreements is to go on strike.”

I can understand why you would be concerned. Nobody ever wants to go on strike.

The only time there is a strike is when an overwhelming majority of your co-workers vote to go on strike. Only you and your co-workers can make this decision.

The superintendent understands that you can negotiate good contracts every year, even without a strike. They want to talk about strikes instead of the issues that concern you. (Specify their issue).

Self-Interested: “I have heard that teacher unions care more about themselves than their students. I care about the kids, I’m not selfish.”

I can understand your concern.

There have been years of attempts to discredit educators. Human beings sometimes make mistakes, but no teacher got into this profession for the fame or fortune.

Teachers get involved in their unions because they do care and know that their working conditions affect the ability for their students to learn. States and countries with strong unions actually produce higher student achievement results. When educators come together and act as a strong voice for public schools, they are able to push for more school funding, adequate resources for struggling children, and state assessments that measure genuine student progress rather than good test-taking skills.

Too Political/Liberal: “The association should stay out of politics. I’m a Republican, not a Democrat.”

That’s a completely valid feeling.

Because every decision about public schools is made by elected officials, we do endorse candidates and get involved in many political issues at the federal, state, and local level.

However, these decisions are made by members and any endorsement is based on a candidate’s support of public education and educators. We also legally can’t use member dues dollars for PACs and you are free to support whomever you think is best for education.

MODULE 5: MAPPING

Basic Mapping: Learning the System

Mapping is done by assigning each person a color depending on what you know about them. The colors will help you see where to prioritize your conversations and relationship building.

Blue

- ✓ **Current Members**

Green

- ✓ **Have said they'll join but never followed through.**
- ✓ **May take one or two 1 on 1s.**
- ✓ **Should be fairly easy to sign.**
- ✓ **Very few of your potential members are likely to fall in this category**

Yellow

- ✓ **New hires, unknowns, people who say dues are too high.**
- ✓ **May take several 1 on 1s.**
- ✓ **You will spend most of your time with this group building relationships.**
- ✓ **Majority of your potential members.**

Red

- ✓ **These are those who have been vocal about not being a member and like to engage people in debates about the Association.**
- ✓ **Should be very few people.**

MODULE 5: MAPPING

Basic Mapping on the Mapping Roster

STEPS

1. Obtain a copy of your mapping roster by worksite.
2. Check over the roster for your worksite and add any staff not listed. You should alert the membership chair or president of any changes.
3. For each potential member, you should write down their job title under grade level/department.
4. Then for each potential member, write down everything you know about them including:
 - a. How many years they've been in the district
 - b. Issues they have with the district
 - c. Why they won't join, who has asked them to join, your relationship with them
 - d. Who they're close to at the worksite
 - e. What you know about their life outside of school (i.e. husband's job, number of children, stresses outside the school)
 - f. Any other tidbits that you know about them.
5. Once you have written notes for each potential member, use color coding (refer to previous page) to highlight each potential member.
6. For each potential member, assign a current member who has a relationship with him/her so that they can be the point of contact for the potential member.

Local Name	Member ID	Name	Member Type	Grade Level/ Dept.	Estimated Generation	Athletic Coach Generation	What we know about them	Org./ Contact
Sioux Falls Education Association	1565665	David Brown		Potential Member		Baby Boomer Generation X Generation Y Millennial	Yes / No	
	1226598	Jane Jones		Potential Member		Baby Boomer Generation X Generation Y Millennial		

MODULE 5: MAPPING

Advanced Mapping: Connections & Trends

Now that you've prioritized your potential members and are starting to see your membership increase, it's time to take your mapping deeper. This approach also works for visual learners.

STEPS

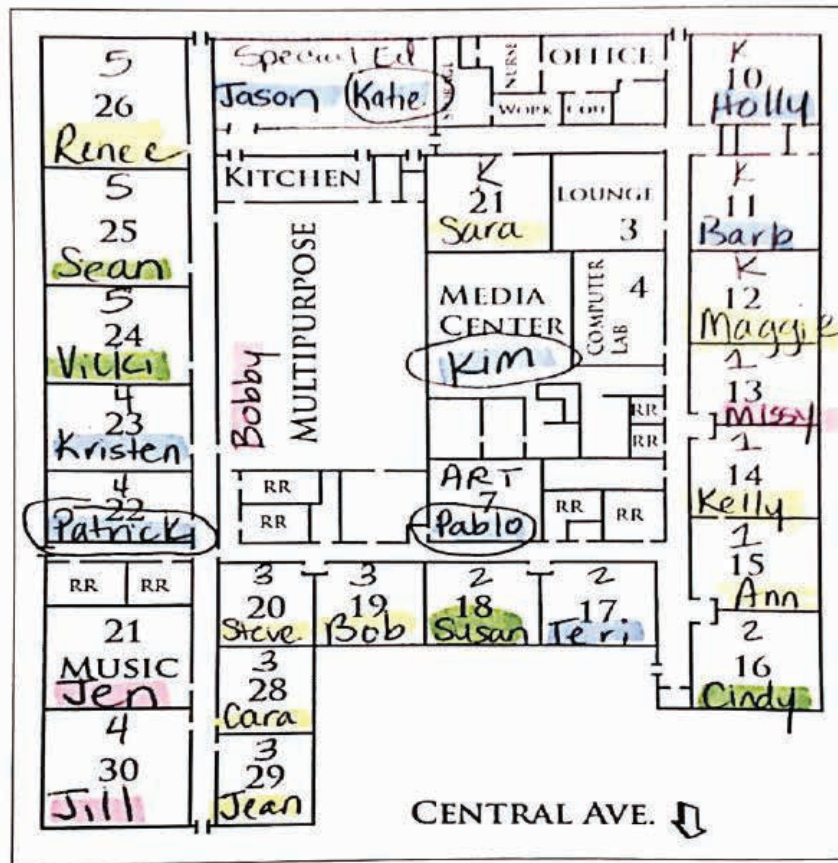
1. You're going to need a map of your worksite (if your worksite isn't just one place i.e. bus drivers, use a chart).
2. On your map, write down each member's name, and highlight his/her name with the same color you used on your roster.
3. Current members should be highlighted in blue, and those members who are strong leaders should be circled.
4. Once you have your map and chart highlighted, look for trends:
 - a. Is one area full of yellow potential members?
 - b. Is one department strong in membership and another low?
 - c. Are any of your members people who get to see most of the workforce (i.e. special education teachers, specials teachers, librarians, district maintenance workers)? Think about how to get these members to be leaders.
5. On your roster, look for trends. Mark the columns for "Estimated Generation" and "Athletic Coach".
 - a. Are all your coaches yellow? Why do you think this is? Have you developed a plan to work on coaches?
 - b. Are all your baby boomers blue and your millennials yellow? How are you reaching out to millennials?
6. Next, look at the notes you wrote down. Do you see any trends there?
7. For units that include shift work or many non-classroom ESP positions, the next step to advance mapping can be charting based on schedules.

Mapping Reminders

- ✓ Rosters, maps, and charts should not be shared outside of those actively building the plan for membership (i.e. officers, UD's, membership chair, AR's).
- ✓ Mapping is only useful as long as it is accurate. Set aside 10-15 minutes each AR meeting to check the mapping data and update as needed. Talk about challenges and see if there are connections elsewhere that can assist.
- ✓ Celebrate your successes!

MODULE 5:

Examples of Charting





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