

CALENDAR

2020 — 2021

12-MONTH GUIDE FOR LOCAL LEADERS

Monthly Ideas for Engaging, Activating and Building Membership



OEA

OHIO EDUCATION ASSOCIATION

| EDUCATION POLICY RESEARCH &
MEMBER ADVOCACY DEPARTMENT

Your Advocate. Your Partner. **Your OEA.**



Congratulations on your position as a local Union leader!

As our Union reality changes, we must learn new strategies and approaches to highlight our commitment to student achievement, public education, and effective education Unionism. Therefore, this booklet is designed to provide you with a monthly roadmap of ideas for engaging, activating and building membership in your local.



Who We Are

The Ohio Education Association (OEA) represents over 120,000 teachers, faculty members and support professionals who work in Ohio's schools, colleges and universities to help improve public education and the lives of Ohio's children. OEA members provide a wide range of professional education services in communities throughout the state.

Our members work in kindergarten classrooms, high school labs and university halls. They counsel adolescents and help students carve out career aspirations. They serve hundreds of thousands of students nutritious meals and work on the front lines in school building offices. They coach athletes and transport students to and from the schools and extra-curricular events. Members provide professional supports to benefit students, schools and the public in virtually every position needed to run Ohio's schools.

OEA members are dedicated to students and public education. Since 1847, OEA has been working to make schools better and improve public education. Our association is dedicated to working in partnership with parents, community leaders and elected officials to help Ohio's students and improve public education.

JUN 2020

INTERNAL

Key Dates:

- **Recruit a Membership Action Team (MAT) to build strong work site structures.**
Tip: Plan to have one team member for every work site in your district.
- **Update rosters of members and potential members, including updating those who have resigned or retired.**
Tip: Those who have retired should be flagged to OEA-Retired for recruitment. Work with your LRC to connect with an OEA-Retired Representative.
- **Meet with the Local's Officers/Executive Committee and reflect on what worked and what did not work with your Local Development Plan in the past.**
- **Make necessary revisions to your Local's membership goals. Develop new goals, benchmarks, and strategies for this year.**
 - *You should have targeted work sites. Identify current membership percentages at each work site. Are there work sites that are less than 70 percent membership that you want to target first? Are there work sites that are close to 70 percent that you want to target next?*

Notes/Goals:

JUNE

THE IDEAL RATIO

One Membership Action Team (MAT) Member
for every 7 to 10 members.

RECRUITMENT PREPARATION

- **Identify a Membership Action Team for each work site.**
 - Choose leaders like worksite representatives, members of discussion teams, bargaining teams, but most importantly choose members who are enthusiastic and involved in the Association. Each MAT member should have an assigned lead/organizer(s) for support and encouragement.
- **Develop a rough timeline of events and benchmarks for membership throughout the year.**
 - Employee events, start of school events.
 - Benchmark one new member per building each month.
- **Develop goals that you want each recruiter and the committee to achieve.**
 - EXAMPLE 1:** Each MAT will have a face-to-face meeting with half of his/her potential members by September 1.
 - EXAMPLE 2:** Each MAT will have three face-to-face contacts with all potential members during the Back-to-School campaign period.
 - EXAMPLE 3:** The local association will collectively invite to membership a total of 50 potential members.
 - EXAMPLE 4:** Each recruiter will make 10 face-to-face contacts to develop relationships and demonstrate that the Association values their membership.
- **Make charts to track progress of the campaign at each work site.**
 - Include the name of the work site, number of members and prospective members, goals for weekly recruitment, and who is responsible for attaining each goal.

MEMBER ENGAGEMENT

- **Keep members informed of any bargaining sessions currently in progress.**
- **Plan a summer social to maintain relationships with current members.**
- **Send a letter to all new employees prior to their first work day.**
- **Establish a "First Friend, Best Friend" Union Buddy System.**
 - Match each new employee with a member from their department or work site. Reach out before school starts and invite mentors to the orientation to greet new employees on their first day.

OEA EVENTS

- **Attend the OEA Summer Academy in Columbus.**
 - Invite members who have never been before.
 - Meet with executive board/council to discuss ideas from Summer Academy.
 - Refine Association goals and initiatives to incorporate Summer Academy ideas.
 - Scholarships may be available through your OEA District or Region.

JUL 2020

Key Dates:

INTERNAL

- **Hold Membership/Back-to-School Organizing Training**
 - *All MAT members, executive board members, and worksite representatives should attend.*
 - *At least two members from each work site should attend.*
 - *Any members not in attendance will need to obtain materials and training information at the local membership meeting.*
 - *Analyze current membership data for each work site. Train members on building mapping and other Back-to-School best practices including local involvement in New Employee Orientation (NEO).*
 - *Fully prepare to execute the OEA New Educator Initiative. Be prepared by ordering New Educator Interest Cards and brochures/flyers.*
 - *Share your timeline, outcomes and expectations; ask for other suggestions.*
 - *Schedule a check-in date after the start of school to review progress.*
 - *Establish a process for getting new member forms to the chair at the end of each week.*
- **Obtain membership materials from OEA to have on the first day of school for new members. Order enough materials to have a successful enrollment campaign that reaches all members and potential members.**
- **Meet with the worksite representatives and officers to discuss OEA and NEA member benefits and discounts.**
 - *Potential members need to be aware of the benefits and discounts that come with membership. Show them how to access benefits.*
- **Create an Association bulletin board in each building.**
- **Use the OEA Membership Training Guide to plan effective trainings for membership campaigns year round.**
- **Identify any building/work site that does not have a representative, and develop a plan to fill that vacancy.**

JULY

NEW HIRES

- **Get names, work locations, and contact information of new hires as soon as they are employed. Check with the District Treasurer, school board minutes, etc. to maintain accurate potential member lists for each work site.**
- **Send them a letter welcoming them to the Association.**
- **Assign a member to assist a new teacher in setting up their classroom for a day before school starts or a fellow Education Support Professional (ESP) to assist with work space.**
- **Hold a new member orientation day facilitated by the Association.**
 - *Cater lunch and invite speakers such as board members, state officers, LRCs, OEA HQ staff, etc.*
 - *Provide a swag bag (full of free items, gift cards, coupons, whatever can be obtained from area donations).*
 - *Discuss why membership is valuable and how your local association has been relevant and visible in the district and/or community.*
 - *Share highlights from collective bargaining agreements.*
- **Review:**
 - *School district policies.*
 - *Medical, dental, and vision insurance.*
 - *Sick, personal, and other leaves.*
 - *Sick leave bank.*
 - *Student discipline by building.*
 - *Dress code.*
 - *School management and gradebook software.*
 - *Resources available locally (die cut machine, clickers, poster paper, copy machines, etc.).*
 - *Evaluation tools and implementation.*
- **Have a social event for new members at the end of the month.**
- **Help new members fill out membership forms and offer giveaways for those who choose to belong that day.**
- **Plan and implement the “First Friend, Best Friend” Union Buddy program.**

MEMBER ENGAGEMENT

- **Keep members informed of any bargaining sessions still in progress.**
- **Plan an end of the summer picnic.**
- **Engage Leadership.**
 - *Have the local president visit targeted work sites.*



AUG 2020

INTERNAL

Key Dates:

- **Have a check-in meeting with members and MATs.**
 - *Review membership materials and remind MATs to have face-to-face conversations with all potential members utilizing the New Educator Initiative program and tools.*
- **Discuss strategies and next steps of the membership campaign.**
 - *Confirm that each work site has sufficient paperwork and potential membership materials.*
 - *Remind MATs of any membership DEADLINES for submitting paperwork.*
- **Request new hire information from District Office.**
- **Update the Association bulletin board to the current year.**
- **Update Association website and/or social media sites with fresh content.**
- **Compile a list of members who wish to cancel their membership or who did cancel their membership the previous year. Start setting dates to visit them for one-to-one conversations.**
- **Conduct a listening tour in targeted work sites with lower membership to identify the values and interests of potential members.**
- **Network with the leadership team. Help one another share ideas.**
- **Create a member business directory. For example, one colleague's family owns a CPA firm.**
- **Execute a team approach to membership—first contact by Association leader A, second by Association leader B, third by Association leader C. Leverage key relationships in each work site.**
- **Verify worksite representative contact information.**

Notes/Goals:

AUGUST

NEW HIRES

Hold a new member luncheon/breakfast.

- Highlight the benefits of belonging.
- Share the benefits offered by OEA and NEA.
- Share positive local stories and victories.
- Emphasize that membership provides them with a voice.
- If available, have the LRC, OEA officer, or HQ staff speak to new hires.
- Open the floor to questions and answers.
- Explain unified dues structure.
- Be prepared to answer tough questions. Refer to the OEA Membership Training Guide.
- Enroll members.
- **Hold a 10-minute welcome meeting at each work site so members can meet their officers and/or worksite representatives.**
- **Plan an active new member meeting that includes one-to-ones and other interactive activities.**
- **Include early career educators in planning new hire events. Encourage these members to participate in the events as their voices may be more persuasive to new hires about the relevancy of the local.**
- **Share information about upcoming OEA professional development conferences or trainings, including connections with Ohio's New Educators (ONE). Visit their website at www.ohea.org/ONE.**

LOCAL PRESENCE AND MEMBERSHIP

- **Write a president's welcome letter for the work site bulletin board or member newsletter.**
 - Welcome members back for another school year.
 - Express the importance of professional membership.
 - Identify the membership chair, as well as worksite representatives.
- **Contact each potential member three times: Initial face-to-face, email follow up, and final face-to-face. In the event that the potential member does not wish to belong, document a reason.**
 - The president should visit each work site.
 - Obtain permission from the building principal/supervisor to speak at a staff meeting.
- **Consider incentives for current members to recruit new members.**
- **Consider OEA staff involvement at a member meeting through visitation by the LRC.**
- **Conduct personal conversations with teachers using a positive message on what the local hopes to accomplish.**
- **Set up tables outside of the meeting location for the first day of school to answer member questions, share ideas, and provide general camaraderie. Encourage new membership forms.**
- **Ensure that all worksite representatives have a copy of OEA's Worksite Leader Guide.**
- **Schedule a worksite representative advocacy training with OEA LRC.**

MEMBER ENGAGEMENT

Host a back-to-school cookout or social event with childcare available (if possible, through reputable providers and partnerships. Check liability). Invite OEA officers, LRCs, or leaders from ONE.

- **Look into an Association tailgate for football games.**
- **Distribute a pamphlet/flyer that highlights Weingarten Rights along with officer and worksite representatives' contact information.**
- **Give worksite representatives signed thank-you cards from the president and appreciation gifts to distribute to each member in their building.**
- **Facilitate Learning.**
 - Hold a mapping training for worksite representatives and the MATs to make membership more efficient and effective.

SEP

2020

INTERNAL

- Update email and other contact lists.
- Develop a list of members with contact information.
- Develop a list of potential members for continued recruiting efforts.
- Send member rosters for each work site to worksite representatives.
- Review/update local assessments and building maps. Assess additional potential targets.
- Recognize the new members at Executive Council/Board.
- Present and discuss the membership density for each building at the next Executive Council/Board meeting.
- Collect/update worksite representative contact information. This info should include full name, building, cell phone number, home email, and mailing address. Keep a copy for records and send a copy to the OEA LRC.

Key Dates:

Notes/Goals:

SEPTEMBER

NEW HIRES

- Complete one-to-one conversations with new educators and collect the New Educator Interest cards/forms from all new educators. Ensure that all cards are returned to OEA for processing.
- Host a social event at a local restaurant, bowling alley, or other spot that allows new hires to connect and network with one another as well as other members for support.
- Share information about upcoming OEA and local events.
- Connect to ONE.
- Provide all new members with a New Teacher or New ESP Guide (contact OEA for copies).

LOCAL PRESENCE AND MEMBERSHIP

- Update the Association's bulletin board in each work site.
- Contact student teachers in the building about joining Ohio Student Education Association (OSEA) and explain the benefits provided to each student teacher along with an OEA Field Guide for Aspiring Educators
- Visit with former members and inquire about their status. Be prepared to answer tough questions. Root invitations to membership in the values and interests of the potential member.
- Visit with new members. Ask if they have any membership questions or concerns.
- Hold 10-minute meeting regarding the Association's goals for the year.
- Consider delivering handwritten notes inviting people to belong.

MEMBER ENGAGEMENT

- Pair active members to talk to potential members (essentially, one-to-ones or two-to-ones). Involve all current members in this activity.
- Hold End-of-the-Week/Pay Day gatherings at a local establishment on paydays. It is an opportunity to meet, greet, and get to know members.
- Hold an OTES evaluation orientation for new and/or current members.
- Hold a "Get to Know Your Contract" meeting. Highlight key bargaining and engage.
- Schedule a meeting for those members interested in political action.
- Check in on the "First Friend, Best Friend" Union Buddy program at each work site. Provide additional support to mentors if needed.
- Check in with all members once they have had their first observation and/or parent teacher conferences.
- Hold a worksite representative advocacy training.



OCT

2020

INTERNAL

Key Dates:

- Update the Association's bulletin board in each work site.
- **Call a meeting of the Membership Action Team (MAT).**
 - *Review recruiting results, membership percentages, and potential lists.*
 - *Remind everyone that membership organizing continues year-round.*
- **Present and discuss the results of your membership campaign at the next Executive Council/Board meeting.**
- **Use membership/building mapping to strategically start converting potential members to active members.**
- **Have department leaders that are members start building a relationship with a potential member in their department or elementary teachers in the same pod or grade level.**
- **Strategize to overcome difficulties and celebrate successes.**
- **Have MATs swap prospects that are difficult to persuade and engage with new tactics.**
- **Provide additional membership training for MATs who are experiencing difficult situations.**
- **Encourage members to subscribe to OEA's advocacy mailing list to receive legislative updates, calls to action and critical political information. See <https://tinyurl.com/oeaadvocate>.**
- **Ensure that every work site has a representative.**

Notes/Goals:

OCTOBER

LOCAL PRESENCE AND MEMBERSHIP

- Continue to talk to and support new employees who are on the potential membership list.
- Brand your local Association and distribute water bottles, pens, or other items branded with the Association logo and motto.
- When a new member joins, send an email asking members to welcome the new member to their union.
- Recognize your bus drivers by celebrating National School Bus Safety Week. Provide breakfast or a grab-and-go snack.
- Provide a copy of OSEA's Field Guide for Aspiring Educators, OSEA membership form, and informational materials to all student teachers in each building.
- Ensure that all student teachers are members of OSEA, the aspiring educator affiliate of OEA.

MEMBER ENGAGEMENT

- Share an updated copy of the contract electronically with members and explain all changes, if any.
- Ask members to join your Association's social media sites.
- Remind members of the do's and don'ts regarding school email and elections.
- Provide your members with a list of public education friendly candidates in their districts and urge them to vote.
- Hold a social.



NOV

2020

INTERNAL

Key Dates:

- Update the Association's bulletin board.
- Present and discuss the results of your membership campaign at the next Executive Council/Board meeting.
- Discuss/plan opportunities for winter work site engagement.
- Ensure that every worksite representative has a roster.
- Highlight the staff roster with members and non-members.
- Identify where non-members work by building and room location.
- Send complete member/non-member list to OEA LRC.

Notes/Goals:

NOVEMBER

MEMBER ENGAGEMENT

- **Use an unsettled contract as an invitation to membership opportunity.**
- **Provide a small “thanks for being a member” refreshment or lunch.**
- **Have a meeting about saving money around the holidays that highlights some of the member benefits available.**
 - *Have members bring in their computers to help them start shopping and saving.*
 - *Have them keep track of how much they save and make a poster for the Association bulletin board.*
 - *Use NEA Member Benefits for ideas. Visit their site at www.neamb.com.*
- **Send out the results of state/national elections.**
- **Send out thank-you notes to those who were politically active.**
- **Hold a turkey raffle.**
 - *Provide raffle tickets to members who attend November's school board and discussion meetings.*
 - *Hold the turkey raffle drawing at the next member meeting.*
- **Review the collective bargaining agreement with members, so they are aware of what it contains and where to find answers to frequently asked questions.**
- **Touch base with new members to offer engaging support.**

OEA EVENTS

- **Plan for attendance at the OEA Advocacy and Organizing Institute (AOI) in February. Scholarships may be available from OEA Districts/Regions.**
- **Celebrate American Education Week. Reach out to OEA for resources.**



DEC 2020

INTERNAL

- Update the Association's bulletin board.
- **Call a meeting of the Membership Action Team (MAT).**
 - *Review recruiting results, membership percentages, and potential lists.*
 - *Remind everyone that recruiting continues.*
- **Write a newsletter and include all the things the Association and its members have accomplished in the first semester. Make the members proud of their organization.**
- **Present and discuss the results of your membership campaign at the next Executive Council/Board meeting.**

Key Dates:

Notes/Goals:

DECEMBER

LOCAL PRESENCE AND MEMBERSHIP

- Order Association shirts with the local Association logo for members for the holidays.
- Distribute OEA Awards and Scholarships information to members (Applications due in January).
- Identify any member that might be retiring and invite them to OEA-R membership.

MEMBER ENGAGEMENT

- Send personalized, handwritten holiday cards (where applicable) to members. Include a short note thanking them for supporting the Association.
- Send out an Association gift to the membership.
- Host the Association holiday party.
- Organize a community event.
 - *Plan a food/clothing drive or other community support event. Post successes per work site. Take pictures of members, and post them on your Association's website, social media or newsletter.*



JAN

2021

INTERNAL

- Update the Association's bulletin board.
- Present and discuss the results of your membership campaign at the next Executive Council/Board meeting. Review work site/membership mapping progress.
- Update membership rosters to reflect staffing changes and notify OEA of any changes in membership and/or potential membership.
- Keep an accurate list of members and non-members in each building and ensure OEA LRC has a copy.

Key Dates:

Notes/Goals:

JANUARY

LOCAL PRESENCE AND MEMBERSHIP

- Talk to new members completing their first semester to see if they need additional support.
- Nominate members for OEA Awards and Scholarships.
- Provide a copy of OSEA Field Guide for Aspiring Educators, OSEA membership form, and informational materials to any new student teachers.
- Ensure that any new student teacher is a member of OSEA.

MEMBER ENGAGEMENT

- Ask members to track financial savings from member benefits and post a running total.
- Send out legislative updates. Encourage members to meet with legislators, write letters to the editor and articles for newsletters, and update bulletin boards about what is happening in the General Assembly.

OEA EVENTS

- Encourage and organize members to attend an OEA Day of Action.
- Plan for OEA's Advocacy and Organizing Institute (AOI). Scholarships may be available from your OEA District or Region.



FEB

2021

INTERNAL

- Update the Association's bulletin board.
- **Call a meeting of the Membership Action Team (MAT).**
 - *Review recruiting results, membership percentages and potential lists.*
 - *Remind everyone that recruiting continues.*
- **Present and discuss the results of your membership campaign at the next Executive Council/Board meeting.**
- **Begin preparing for a Membership Early Enrollment Campaign.**

Key Dates:

Notes/Goals:

FEBRUARY

LOCAL PRESENCE AND MEMBERSHIP

- Remind members of your Association's website and social media sites.
- Organize an Association night at a local basketball game and ask members and their families to attend. Consider purchasing and giving small basketballs that are branded with the Association's name.
- Develop and share with your administration a climate survey concerning:
 - *The Association*
 - *Work Site*
 - *The District*

MEMBER ENGAGEMENT

- Gather the names of the members who are retiring. Consider nominating a retiring member for a lifetime achievement award.
- Give retiring members an OEA-Retired lifetime membership form and invite them into OEA-R membership.
- Check in with members regarding second observation and assign struggling members a union buddy.
- Distribute the OEA/NEA member benefits sites for spring break travel, car rental, lodging, etc. and post any savings to the work site bulletin boards. Visit the NEA Member Benefits website for assistance at www.neamb.com.
- Hold an Association bowling night at a local bowling alley.
- Organize a breakfast or dinner with new members.
- Recruit and nominate members for Association leadership positions according to local guidelines and timelines.
- Compile a list of teachers with expiring licenses and remind those teachers of their obligation for license renewal.



MAR

2021

INTERNAL

- Update the Association's bulletin board.
- Present and discuss the results of your membership campaign at the next Executive Council/Board meeting.
- Discuss climate survey, areas of improvement and improvement timeline identified with administration.
 - *Share results of climate survey and subsequent action steps with members.*
- Begin preparing for Back-to-School organizing campaigns for the next school year.

Key Dates:

Notes/Goals:

MARCH

LOCAL PRESENCE AND MEMBERSHIP

- **Contact student teachers.** Inform them of the OSEA/ONE/OEA Professional Development Conference in April.
- **Celebrate “Read Across America Day”.** Resources are available through OEA/NEA.
- **Hold a Book Drive Challenge** at each work site and/or donate books to a school in need or a Children’s Hospital.

MEMBER ENGAGEMENT

- **Begin plans to recognize retiring members** as they are in their last semester of their professional career.
- **Have a spring break gift card drawing.**
- **Distribute a reminder of OTES/RESA timelines.**
- **Celebrate!**
 - *Take time to recognize local achievements, no matter how big or small.*



APR

2021

INTERNAL

- Update the Association's bulletin board.
- **Call a meeting of the Membership Action Team (MAT).**
 - *Review recruiting results, membership percentages and potential lists.*
 - *Remind everyone that recruiting continues year round.*
- **Present and discuss the results of your membership campaign at the next Executive Council/Board meeting.**
- **Continue planning for Back-To-School Campaign.**
- **Train worksite leaders using the OEA Worksite Leader Guide and Membership Training Guide.**

Key Dates:

Notes/Goals:

APRIL

LOCAL PRESENCE AND MEMBERSHIP

- Organize an Association beautification project and plant flowers outside a school for Earth Day.
- Write thank-you notes and/or provide gifts to school secretaries for Administrative Professionals' Day.

MEMBER ENGAGEMENT

- Gather the names of the members who are retiring and write thank you cards.
- Organize a retirement banquet, party, or social.
- Notify retirees of OEA-Retired membership and invite them to belong.
- Show Gratitude.
 - *Write thank-you notes for those who helped the Association this year, from making snacks for meetings to working on a bulletin board to attending meetings.*



MAY

2021

INTERNAL

- Know your officer transition procedure and update elected leader contact information. Send updates to OEA.
- Update the Association's bulletin board.
- Use building maps to evaluate successes and start focusing on other potential members.
- Present and discuss the results of your membership campaign at the next Executive Council/Board meeting.
- Finalize planning for Back-To-School and identifying areas to support over the summer months to be prepared for a great membership kickoff in the fall.

Key Dates:

Notes/Goals:

MAY

MEMBER ENGAGEMENT

- Provide breakfast for the members or goody bags for Teacher Appreciation Week.
- Finalize retirement celebration plans. Be sure to include all members in the celebration so they have a chance to thank their colleagues.
- Invite local OEA-Retired members to transition members to OEA-Retired.
- Hold a Local Association Day party.
 - Allow members to attend for free.
 - Non-members can attend for a fee.
- Recruit and register members, including newer members, to attend the OEA Summer Academy in June.
- Celebrate your school nurse for National School Nurse Day.
- Assist any member who has been laid off (RIF'd) or non-renewed.

OEA EVENTS

- Attend the OEA Summer Academy in June.



OEA

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