



# Worksite Leader Guide

OEA

OHIO EDUCATION ASSOCIATION

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

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**We're working together  
to provide a quality public  
education to every student,  
regardless of zip code.**

Every student has a basic right to a great public education. That's why your Association is about more than salary and benefits. It's about creating schools and supporting the educators who are nurturing tomorrow's inventors, thinkers, artists, and leaders.



OHIO EDUCATION ASSOCIATION

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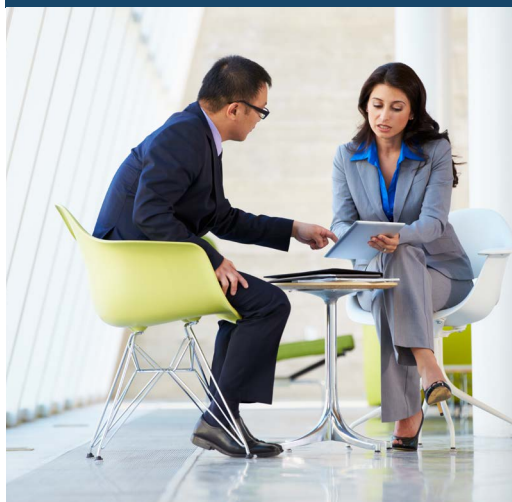
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## Thank you for your leadership!

As your OEA staff, we would like to welcome you. We hope this booklet provides helpful tips and resources in a variety of areas related to your professional advocacy. If you have questions, please contact your local Association officers, representatives, and/or OEA Labor Relations Consultant (LRC) for assistance.



## 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.





# OEA Core Values

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Our Core Values represent our Association's most deeply held beliefs. They are the fundamental forces that drive us. They are what we believe, and they are why we act with passion and steady commitment. Core values give us guiding principles.

## DEMOCRACY

The foundation of a strong democracy is high-quality public education, which is essential for an educated citizenry.

## COLLECTIVE ACTION

When we unite as one voice, we are strong advocates for learners and our profession.

## FAIRNESS

A high-quality education, accessible to all, promotes a fair and just society.

## INCLUSION

We respect and embrace the diversity of all communities.

## INTEGRITY

By holding ourselves to the highest standards, we promote good citizenship and maintain the public's trust.

## PROFESSIONALISM

Professional judgment and the expertise of educators are critical to student success. Educators deserve the status, compensation, and respect given to all professionals.

# You're a Worksite Leader — Organizing people to get something done they could not have accomplished alone!

## Your Role as a Worksite Leader

Together we work as an organization to solve problems and improve our lives and the lives of our students. Why? Because being part of the collective amplifies our ability to be heard. It makes change possible when it would be impossible for one person to do it on his or her own. Belonging to the Association gives us tools to enhance our knowledge and skills to solve problems that affect us. Who are the best problem solvers to address the issues we face in our work? We are—the ones who are most affected by our situation. Not only do we have an interest in finding a solution, we are in the position to offer alternatives.

### **BUILDING RELATIONSHIPS**

What do people in your workplace think? How do they feel? What energizes them? Listen first to hear what is important to others and pay attention to issues that need to be addressed. Worksite leaders build a community by finding ways for people to get to know each other and have face-to-face contact. Association meetings, socials, and conversations are all ways to keep people in the know about issues that may affect them and maintain commitment to each other. Through relationships, worksite leaders understand the bigger picture regarding the general health of their work site. They see first-hand the morale, concerns, motivation, and passions of their colleagues.

### **ORGANIZING FOR POWER**

As worksite leaders, we know why we invest time and energy in our Association. It includes access to expertise, advocacy support in our work and profession, a sense of community and meaning, and personal and professional development. Without a connection to the mission of the organization, the power of our local Associations will diminish. Association leaders promote 100% membership at their work site. With every member, we gain the power to be heard and the respect to be influential. Worksite leaders know the significance of continual leader identification to replace members who leave, discover new leaders, new perspectives, and to maintain relevance as an Association.

### **ORGANIZING AND FACILITATING CHANGE**

Worksite leaders are organizers who mobilize members for collective action. As change agents, it is the Worksite Leaders who bring together good ideas, people, and the ability to facilitate change. Worksite leaders think of specific tasks to involve other people and reach out to others who benefit from Association representation and share the values of the group.

### **BUILDING TEAMS AND ENGAGING THE TALENTS OF OTHERS**

Building an organization takes a group of people with a vision and a willingness to take responsibility, establish a plan for action, and create space for every member to be involved. The cohesive bond that comes from working as a team builds a sustainable organization. Groups succeed because of the multiple perspectives, skills, and talents that can work as a team. A small win is enough for people to develop a sense of their own power and overcome attitudes that "nothing can be done." It takes an organizer to provide the vision, encouragement, and persistence to make a difference.

### **IDENTIFYING POTENTIAL FUTURE LEADERS**

The worksite leader sees who is respected, to whom people listen to, and who stays behind to help. These are the people who may very well be future leaders of a work site or local Association. Together, we work as a team of leaders to make things better for ourselves that otherwise would not get done.

# How to Organize and Create Change

As a worksite leader, you must always be aware of workplace conditions, the climate and morale, and what your members are thinking and feeling. Issues often arise that present organizing opportunities that increase engagement and power at the work site level. Your Association will help you learn how to build your collective strength through organizing. It is not one more thing to do, but rather the way you look at things. Locals should constantly be helping members organize for power to meet member needs and to develop member capacity to address issues on their own. This requires steps of listening, planning, action, and evaluation in ongoing cycles.

## STEP 1: LISTENING

As a worksite leader, you may have an idea of what the issue is and how to frame it, but it is critical to listen regularly to other members and potential members to verify and frame relevant issues.

- Listening is not asking, "Is this issue important to you?", but instead asking, "What is important to you?"
- The listening step should involve people at each work site.
- Listening should involve as much one-to-one interaction as possible.
- Establish a membership recruitment goal while exercising the listening step.
- Set a participation goal.
- Listening should include education about issues and agitation toward action.

## STEP 2: PLANNING

Use an action planning document to calendar events and to be strategic in applying pressure upon decision makers using actions that escalate and agitate.

**WHO:** Identify the people responsible for each part of the activity. Everything to be done is a chance to engage members and identify new leaders.

**WHEN:** Communicate the date(s) of the event or activity.

**PROGRAM:** Set a membership goal, a participation goal, and a new leader identification goal for every activity or event.

**VISIBILITY:** Create a presence at your site. Use the activity to create awareness about the Association and how to get involved.

**PROMOTION:** Utilize the issue to generate excitement or urgency for individuals at your site to work collectively. Make it easy to get involved at some level.

**MEMBERSHIP:** How do you use the activity to promote and grow membership?

**HELP:** Identify what help you might need from others to make the event a success.

## STEP 3: ACTION

Action steps should be graduated in perceived risk levels, starting at a low level and escalating with subsequent actions. Actions must be a reasonable first step toward causing the change you want. Identify the decision maker, frame the issue, and define the win for the action carefully.

For example, if you are gathering signatures on a petition, don't define the win as causing the change through the petition signatures; define the win as collecting signatures from 70% of the people. Then, the next action step is premised on the decision maker having ignored the will of 70% of the people. When deciding what you will ask people to do, think about these things:

- How will you define the win?
- Will the action be seen as a step in causing the desired change?
- What is the perceived level of risk for the action?

## STEP 4: EVALUATION

Check results of the work done with regard to the organizing issue as measured against your established criteria. Summarize the results of your efforts and record next steps-organizing is cyclical.

# Communicating with Members and Potential Members

## KEEPING MEMBERS “IN THE KNOW”

When you have information, take an action or make a decision. Many communication barriers can be avoided if you ask four simple questions:

- Who should know about this?
- What part of the information does the other person need to know?
- When does this person need to have this information?
- Why?

## WORKSITE LEADERS NEED TO:

- Understand and communicate what it means to be a member of the Association.
- Be an active listener to members' concerns about the Association.
- Inform the Association of members' concerns and vice versa.
- Stay informed of what the Association is doing and what it stands for.
- Host monthly 10-minute meetings at each work site.
- Update and maintain a work site roster (know who the members **and** potential members are in each building.)
- Know the vibe in your work site. What are the issues, needs, positives, challenges, etc.?
- Make your presence known.
- Send a friendly note to everyone in the work site to introduce yourself and provide your contact information.

## TIPS FOR WORKING WITH YOUR ADMINISTRATION:

- Share site problems and brainstorm solutions.
- Schedule regular meetings with your worksite administrator to provide him or her with issues, concerns, and good news updates.
- Request that worksite leaders are provided time at staff meetings to share Association news.
- Work to encourage a healthy working environment.
- Seek opportunities to collaborate and promote school effectiveness, staff professionalism, student growth, and parent support.

Dear Principal/Supervisor:

I'm proud to inform you that I will be serving as a worksite leader of the \_\_\_\_\_ Education Association this year. I hope to work collaboratively with you, bringing ideas, issues, and suggestions.

Sometimes members may call on me to be in meetings as their representative. When this occurs, I plan to be solution-oriented.

I look forward to working together and meeting with you as needed. Please do not hesitate to contact me.

Sincerely,  
WorkSite Leader Signature  
Worksite Leader Contact Information

## REACHING YOUR AUDIENCES

*Do you know who the members are in your building?*

Maintain an up-to-date work site roster, with contact information, which clearly identifies who is and who is not an Association member, list contact information, and work location.

*Listen to staff and maintain a pulse at your work site.*

As you have one-to-ones, create a database of their responses, values, interests, etc.

*What are your opportunities to communicate with members and potential members to keep them aware of issues, opportunities, local goals, and successes?*

- **One-to-one conversations** — listen and share information with members and potential members in order to build and maintain relationships, and understand needs and interests.
- **10-minute meetings** — an opportunity to share and gather important information.
- **Newsletters**
- **Social media**
- **Website**
- **Phone/Text tree** for emergency or critical information.
- **Mailbox notices**
- **Email notices** — develop a contact list of members.
- **Send the Association calendar** to each member on a monthly basis.
- **Bulletin boards**
  - Provide a visual reminder of Association actions and how to be involved.
  - Select a designated area frequented by members and potential members.
  - Ask your Association to produce a bulletin board kit for you.
  - Clip and post positive newspaper or online articles about the Association and/or members at your work site.
  - Update the material regularly.
  - Have a communication strategy for an emergency or critical information.

### **Suggested key bulletin board elements:**

- *Header: Association Identifier (logo/message)*
- *Section Headings*
- *Worksite Representatives*
- *News*
- *Association Officers*
- *Public Policy and Political Action*
- *Teaching & Learning and Professional Resources*
- *Employee Rights and Advocacy*
- *Member Benefits*



# Suggestions for 10-Minute Meetings

## MEETING PREPARATION

- Use a sign-in sheet or use <http://checkin.ohea.org>.
- Set out snacks and beverages.
- Prepare talking points and share via video or PowerPoint presentation.
- Hang up invitations in visible places: mailbox areas, bulletin board.
- Ask members to bring a potential member (or another member).
- Ask for RSVPs so that adequate food, prizes, and/or incentives are provided.
- Have feedback sheets available.

## SAMPLE MEETING AGENDA

Minutes	Topic	Rationale
<b>2 minutes</b> (Minutes 1-2)	Give brief overview of major topics discussed at the last Association meeting.	You're keeping members informed. Keeping members informed is not a matter of how much they are told, but rather, the reality that you are working hard to keep members up-to-date.
<b>4 minutes</b> (Minutes 3-6)	State a current issue. You need consensus before you go to the next step in submitting the collective view of your membership.	The mere process of getting members consensus reinforces in the members-at-large that their voice has been heard and will be represented to a higher level. If you neglect this step, you may have mistrust and hostility from your members.
<b>3 minutes</b> (Minutes 7-9)	Take a stand or make a decision about the issue.	This may not be a burning issue that came up at an Association meeting, but the members need to feel that the Association is conscious of their proximate needs. Taking collective action creates a sense of solidarity.
<b>1 minute</b> (Minute 10)	Recognize a recent issue or volunteer effort that made a difference. Thank and praise often.	Praise and encouragement will nourish the members toward developing a spirit of optimism. An "all is lost" attitude will eventually kill support for the Association's goals — especially during negotiations or when a major crisis is brewing.
<b>Closing</b>	Schedule next meeting.	

# Sample Membership Survey

Name \_\_\_\_\_ Phone \_\_\_\_\_

School \_\_\_\_\_

Address \_\_\_\_\_

Date Contacted \_\_\_\_\_ By Whom \_\_\_\_\_

Hello, my name is \_\_\_\_\_ and I am a member of the Ohio Education Association or \_\_\_\_\_ Education Association. We are doing a phone survey and would appreciate you answering a few questions. It will take just a few minutes.

1. What do you consider the most important issue facing primary teachers, administrators, secondary teachers, coaches, custodians, and/or bus drivers today?

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2. Are you a member of your local education Association? ☐ **YES** ☐ **NO** (If no, skip to question 6)

3. What has the Association been doing that it should continue?

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4. What do you think the Association should be doing?

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5. What do you think the Association should **stop** doing?

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6. Have you been asked to join this year? ☐ **YES** ☐ **NO**

Will you join now? ☐ has joined ☐ will join ☐ may join ☐ will not join

Comments or recommendations:

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## FOLLOW-UP

Letter sent \_\_\_\_\_ by \_\_\_\_\_

Phone call \_\_\_\_\_ by \_\_\_\_\_

Other \_\_\_\_\_ by \_\_\_\_\_

# Work Site Phone/Text Tree

Consider using apps to make this process easier. For example, *Remind* or *GroupMe*.

## MAKES FIRST CALLS

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# Getting Involved in Your Local Association Form

Local Associations rely on volunteers. If members volunteer just two to four hours this year, you'll have plenty of resources to handle whatever Association activity comes up. You may want to consider using an online document, JotForm, or a paper form like the one shown below.

## Volunteer! How would you like to be involved in your Association?

Please fill out the form below and return it to your worksite leader. Please number in order of preference, two or three tasks that you would be willing to perform for your Association.

Name:	Work site:
Preferred contact method:	Best time to contact:
Phone:	Text:
	Personal Email:

	Writing newsletter articles or letters
	Attending school board meetings
	Bringing snacks to local Association meetings
	Coordinating and setting up social event(s) for the Association
	Researching data to be used in negotiations
	Invitation to membership phone calls
	Ballot measures — phone calls or door-to-door literature drops
	Surveying, collecting, and compiling data from employees for Association presentations
	Picking up and delivering materials to schools
	Working on site issues in an organizing campaign
	Taking pictures at your school or work site for local visibility
	Speaking at public forums on relevant education issues
	Stuffing envelopes for the Association
	Lobbying Legislators
	Producing and/or editing the newsletter
	Representing the Association at community or state meetings or hearings
	Joining a School Board Contact Team
	Providing Professional Development for the site or local
	Other: <i>(Enter activity here)</i>

## What are your other interests? What role would you consider?

Name:	Room #:
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Please check any of the following local Association committees you are interested in serving on.

	New Educator Network		American Education Week/Teacher Appreciation Day/Read Across America
	Leader at my work site		Communication/Social Media/Newsletter/Website
	Member Advocacy		Social Committee
	Membership Action Team		Legislative Contact
	Quality Teaching and Learning		Negotiations
	Professional Development for ESP members		Cultural Competency/Social Justice
	School Board Member Contact		Bullying in the Workplace

Are you a member of any fraternal, political, or professional organization in the community? If so, please list (if needed, continue on the back).







# Help potential members understand that joining enhances the Association's impact; **there is strength in numbers.**

## The Invitation to Membership

*Membership involvement is the source of our support. Membership growth does not merely happen. It must be promoted and maintained by Association officers and representatives who recruit new members and keep them informed and involved. Effective local Associations discuss and implement a thoughtful annual membership plan that is based on the shared vision and goals of its members.*

### WHY BELONG?

*People join the Association for various reasons:*

- **Support and Relationship**
  - Members have access to some of education's most sought-after resources and supports to help them reach, teach, and inspire Ohio's students.
- **Influence and Power**
  - As trusted professionals, educators are best equipped to make decisions to ensure student success.
- **Protection and Advocacy**
  - With a collective voice of more than 120,000, membership means less worrying for you and more support from your OEA.

### MEMBERSHIP INVITATION

Few people belong to an organization without being asked. School employees will belong to the Association when a knowledgeable and respected colleague helps them to understand just how much their employment interests are best served by belonging.

Public school employees are very much aware of the many demands being placed on today's school systems. They know that their job security, salaries, fringe benefits, and working conditions will be protected and improved only through an organization that fights for public education and to enhance their careers.

School employees know that their professional interests are advanced by adding their membership strength to the Association's longstanding commitment to the goals of a quality public school education. They belong to be part of that commitment.

### WHEN TO INVITE

#### **New to the Profession Employees**

New employees come to your district with little knowledge about the district. They look forward to a friendly reception, positive relationships, and a good working climate in their new jobs. You are in an advantageous position to set the tone for a positive environment and should do so as quickly as possible.

- *Get names and home addresses of new employees as soon as possible after they are employed. Don't wait.*
- *Work with your human resources (HR) department to get the list. Use a public records request if your HR department is resistant.*
- *Send a welcome note with highlights about your local Association, it can be a simple postcard.*
- *Invite them to a social event (breakfast, lunch, party, picnic) before the start of the school year. At the right time during the social event, have your president speak to the new employees about the Association and why their membership is necessary. Then sign them up on the spot.*
- *If some new employees cannot attend the function, arrange for a time when you can talk to them individually and privately.*

#### **Current Employees**

Unfortunately, there are people who do not belong. They benefit from the work of members but have found a "reason" that makes them comfortable as non-joiners. Use strategies from your membership plan such as one-to-one conversations to help others understand when they do not join it diminishes the ability to have a powerful organization. Share successes of your local Association. Keep it fresh to ensure that the conversation is positive and focused on the potential members' understanding and appreciation for the value of membership. New technology offers new ways to invite but talking face-to-face is still the most effective strategy.

As our Union reality changes, we must learn new strategies and approaches. Rather than allowing our Unions and our mission to be defined by our opponents, we must find new ways to highlight our commitment to student achievement, public education, and effective education Unionism.

The invitation to Union membership (or affirmation of membership) is one context in which we have the best opportunity to uphold our values and our message about the power of our Union and our members in the fight for public education.

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**When inviting colleagues in public education to belong to our Union, try pulling from messages like the ones below:**

**"I can tell how deeply you care about public education and about the work of our Union to fight for what students and school employees deserve.** The movement is even stronger when YOU are a member. Are you ready to take that step to further support the cause?"

**"Our Union is the leading advocate for students, for public education, for public school employees, and for the future of our community.** And our movement is stronger when ALL school employees belong."

**"I know that you're the kind of educator who will stop at nothing to make sure your students have what they deserve...so what's stopping you from being a member?"** (because being a member is one way that we work to make sure that students, schools, and communities have what they need and deserve!)

**"Our students are waiting for the funding and resources that they need.** Our school employees are waiting for the compensation and respect that they deserve. Our communities are waiting for the public education system that they've been promised. But if everyone waits, then nothing changes. Simply waiting doesn't get any of us what we deserve. And that includes waiting to become a member. Are you ready to STOP waiting? It's time for us ALL to act."

**"I can tell you're thinking about the cost of membership, but think about how costly it will be if our state continues to undermine and underfund public education.** Think about how costly it will be if we fail to deliver what our students deserve. Becoming a member NOW helps us fight the fight that can save us ALL from these devastating costs down the road."

**"It's time for educators to take back control of education.** Politicians and our opponents have been telling us what THEY want education to look like and what THEY want our Association to look like. Public education is OURS. Let's take it back. Our Union is the way that we can. Join us now."

**"The people that have been dismantling, privatizing, and taking over public education are the same people that want our Union to be quiet, weak, small, and powerless.** The longer you go without becoming a member, the longer the people attacking public education get everything they want. We can stop them. YOU can stop them."

**"Belonging to our Union isn't just about what you get when you're a member. It's about what the whole state gets when we're all members.** It's about what students get when our Union leads all public education supporters to victory to ensure that public education delivers everything that students and educators deserve."

# The number one reason potential members don't join the Association?



**No one asked them.**  
*(So, let's ask!)*

## **Every Association leader should be prepared and responsible for reaching out to and recruiting new members.**

Membership is the key to everything we do in our Association. Maintaining high membership is our source of power at the bargaining table and in the workplace. Maintaining high membership requires the recruitment and engagement of all members. It requires inviting potential members to belong, educating members and potential members about the history of Union membership, benefits of membership, and engaging members in issues and activities that are important to them in their personal and professional lives.

While membership recruitment and engagement activities and strategies are addressed in the [https://www.ohea.org/cms/assets/uploads/2021/06/2021\\_OEA-Calendar-Final-1.pdf](https://www.ohea.org/cms/assets/uploads/2021/06/2021_OEA-Calendar-Final-1.pdf) this resource is a tool to assist worksite leaders in focusing on the invitation to membership.

While most member recruitment efforts are concentrated at the beginning of the school year, any time is a good time to welcome a new member. Membership recruitment is about relational organizing and making personal connections.

Few people join the Association without being asked. In fact, the number one reason potential members do not join is because no one asked them to join.

The most successful membership recruitment activity involves having a one-to-one conversation with a potential member, in which you actively listen, share your story about why membership matters, share information about the Association's values and accomplishments, and provide resources and materials that are pertinent to the potential member's personal and professional life.

# Understanding New Educators

## KEY FINDINGS






*From a recent survey of 1,282 new teachers (less than 10 years of experience.)*

- **Feeling supported is the strongest driver of professional satisfaction.** This is not a new finding—we have found this connection in prior surveys.
- **Contact with members (how frequently and recently we have reached out to them) is the strongest driver of Union satisfaction, loyalty, and commitment.**
- **Knowing that NOT belonging could weaken the Union to the point where it could no longer negotiate wages, benefits, and working conditions is the strongest reason for maintaining membership.**

## ADDITIONAL FINDINGS

Early career teachers are <b>discouraged with professional conditions</b> and become more discouraged with experience.	Right now, teachers turn to <b>colleagues and informal networks for support.</b> The Union is not yet an essential part of their support network. This is an opportunity.	Just one third felt very <b>well-prepared by their prep programs</b> when they entered the profession.
They have widespread access to <b>formal development and support systems.</b> The issue they raise is quality.	While they give their Union high ratings, they are largely unfamiliar with what the Union does.	There are clear opportunities for OEA and local affiliates to <b>become essential to new teachers' professional lives</b> —formal support drops dramatically after year one, which contributes to professional dissatisfaction.

## KEY TAKEAWAYS

				
Get to know each new educator. Listen and empathize.	Find out how you can support them (Mentoring, Union buddy program, etc.).	Invite them to local Union events and check in with them throughout the year.	Share your story and the Union's story. Our history and victories. "We are your seat at the table."	Share resources from OEA/NEA and your local that could be helpful for a newer educator and/or invite them to an OEA conference.

# Members Want Support

Our members want to feel supported — that the Union has their backs and hears their achievements and concerns. **Below is some information we should know on why our members say support is key to joining or remaining with their Union:**

- The strongest predictor of our members' job satisfaction is whether they feel supported.
- Feeling supported could mean close friendships in the workplace, colleagues with whom to share lesson plans and tips, an informal mentor, or someone to speak up for them during workplace challenges.
- Our members are the best source of support for one another and connections to their Union encourage them to care about, support, and nurture each other.
- Members who feel support have had at least one face-to-face interaction with the Union within the past year. Those who indicate they don't feel supported haven't been engaged by the Union.

## Talking Points

• These talking points will help frame a conversation with a member or potential member about Union support. These are conversation guides. Remember, it is about making an authentic connection. We should be listening, not telling.

- Our Union is here for us. Whether it is advocating for better salaries or making sure we are protected in the workplace, our Union is here to make sure we're not alone. In our Union, we lean on each other and listen to each other's workplace concerns and work together to achieve a solution.
- Being an educator isn't just a job. It's a calling — one that's also personally rewarding and professionally demanding. It's the reason our Union strives to provide the support you need to be great at what you do.
- As a member, you have the support that comes from being a part of a Union that shares your values and advocates for the things we all believe in: equitable school funding, resources for students, and professional support.



# Members Want to be Heard

Our members want to feel that their Union hears what they say and responds. This is the number one way to build Union loyalty. Make sure you ask educators what support they need, what issues they care about, and how they want to engage with the Union. This is how to build a strong connection. Then, after listening and understanding their concerns, connect their issues back to the work and priorities of their Union. **Listening and connecting is always better than telling. As an organizer, remember the following:**

- Forging a strong connection with members involves being willing to listen.
- The best setting for developing a strong connection involves face-to-face or small group interactions.
- We can't be a collective voice for educators if we are not willing to listen to what they have to say.
- Ask the member about their day or about the changes they want to see to make their job easier, better, or more fulfilling.

## Talking Points

**When it comes to making members feel heard, we can't stress enough the importance of listening. Once again, it's about building a connection through small groups or one-to-one conversations. Big meetings DO NOT build connections. And while talking points are not necessary for listening, here are a few opening lines to get members talking:**

- "Hello, I am (name) with the Ohio Education Association (or name of Local). I just want to check in with you to see how things are going. How are you doing?"
- "Being a member of our Union means having a channel for sharing your frustrations as well as your hopes and having the power and collective voice to advocate for yourself and your students. So, tell me: What are you concerned about, and what would you like to see changed?"
- "I remember my first year as an educator. I was really overwhelmed. Sometimes it felt like I was drowning. How are you feeling? Do you need help with anything?"

# Members Want Follow Through

Listening to members' issues and concerns is key. Acknowledging their issues and providing support where appropriate shows you are there to meet their needs and conveys the value of membership on a personal level. Where appropriate, follow up and give members opportunities to take action on issues they feel are important to them. **Whether it is professional development, dealing with a contract issue, or helping them amplify their voices for students, following up and delivering on their concerns is critical:**

- Even the most loyal member can feel taken for granted if there is not continuous engagement and conversation.
- If we want members' connection to remain intact — and grow in intensity over time — we must reach out to them continually, consistently, and authentically. This not only builds lasting ties; it also helps build member advocacy and activism.
- If you're engaged in a listening tour, it is imperative that information around issue identification leads to at least one action or response from the local. Agitation without action can lead to members feeling that the Union lacks power to solve important issues.

## Talking Points

**All relationships require attention and maintenance. Here are a few suggestions for how you, as an organizer, can follow up with members and potential members to strengthen the connection they feel to their Union:**

- Invite them to participate in Union events and meetings, as well as trainings and support opportunities — especially those linked to the issues they care about.
- Point out the online and offline tools available to them on issues like classroom management, student centered advocacy, and a host of other topics.
- Point out how belonging to their Union helps them grow their network by making connections with educators at their work site, in their state, and among OEA's 120,000 plus members;
- Make sure your communication with them is consistent and ongoing. The more they hear from you and receive opportunities to weigh in, the more loyal they become.
- Members take in information in different formats, make sure you are layering communication through email, text, social media, and in-person communication.

# Members Want Strong Connections

The importance of building an authentic connection with potential members, new, and current members can't be emphasized enough. Strong relationships lead to strong Union connections. The more we build relationships with members, the stronger their loyalty. This can be done through consistent one-to-one or small group interactions. **Building a connection with a member starts with being willing to listen. Also, as an organizer, keep the following in mind:**

- Members who are asked in person to belong to the Union are more likely to have favorable views of the Union than those who received a card in the mail asking them to join.
- Even years later, a personal invitation to belong to the Union continues to impact how connected they feel to their Union.
- To keep the connection going, communication must be consistent and continuous.
- Consistent communication increases member involvement in advocacy and activism and boosts loyalty.

## Talking Points

### Tips for building strong connections with members:

- Face-to-face or small group interactions are ideal for building connections.
- Ask members powerful and open-ended questions to get them talking about what matters most. (What are your concerns? What changes would you like to see?)
- Don't dominate the conversation. Your job is to listen.
- Stress that being a Union member means having a channel for sharing frustrations and hopes, and having the power and collective voice to advocate for yourself and your students.
- After you've listened to their concerns, connect their issues back to the priorities and work of the Union.

## Sample Potential Member Roster

## POTENTIAL MEMBER ROSTER

Membership Organizer: \_\_\_\_\_

Work site: \_\_\_\_\_

Membership Coordinator: \_\_\_\_\_

Phone: \_\_\_\_\_

[illegible]

CATEGORY CODES: **NM** (New Member) / **DO** (Dropout) / **HO** (Holdout) / **CO** (Competing Organization)

# One-to-One Conversations

### ASK QUESTIONS

You want to build a relationship with this person to understand their values and what really moves them. Why are they in this district? Do they like the work? Do they have a family?

### ACTIVELY LISTEN

This is not a sales pitch, but it's not an interview either. Make personal comments and share information about who you are. The more you both know about each other, the deeper the relationship.

### AGITATE

Be familiar with what issues may come up. Agitate means to move your colleagues to action, not irritate them. It should be uncomfortable for them to sit on the sidelines.

### ASK FOR COMMITMENT

When a potential member joins or an existing member commits to attend an Association event, this is a commitment to action.

- A colleague who has personal credibility, or who is an avid Association member, can often make a big difference in the success of the discussion.
- Avoid questions like "Would you like to join?" Instead, follow up your quality one-to-one conversation with handing them a membership application and a pen.
- Be optimistic about what can be accomplished collectively.
- Convey a friendly, helpful attitude. Regardless of what is said, keep your cool. Be confident and enthusiastic.
- Handle criticism by putting it to work, "I am glad that you are as concerned as I am about that issue. You are just the person to help us organize around it and take action."
- Stress that the reputation of the local grows as does its size and success. Each member contributes to that reputation.
- Membership is in the employee's best interest. It counts when the Association lobbies local school boards for policy changes. It counts when the state and national organizations lobby successfully for education change. It really counts when employees need legal assistance. There's a great deal more at stake than just more members – the individual member's livelihood and the future of public education are at stake.
- Brochures are only a means to an end. The material supplied by OEA to assist in membership promotion is only a means through which you can begin discussion with potential members. By itself, it is not the way to promote membership. Call attention to specific benefits or programs that might be important to the potential member and give them those materials.



# Mastering the Art of a Conversation

## RELATIONAL ORGANIZING: IT TAKES CONVERSATION

Member recruiting methods such as putting membership forms in staff boxes at your work site or offering member discounts on various services will not, by themselves, convince a person to become a member. Relational organizing through one-to-one conversations is essential in recruiting membership to strengthen the Association.

In these one-to-one conversations make sure you listen more than talk, engage the potential members in open-ended conversation, and look for opportunities to invite them to belong instead of lecturing them to join. Be focused on listening to the potential member to understand their interests. Share your personal story/experience. Relate the value the Association can bring to them in the hopes that they will want to stand with us. One-to-one conversations allow us to identify and address issues at the local, state, or national level. Conversations also allow us to identify potential Association activists and leaders.

Remember, educators didn't become educators to join the Union, they became educators so they can work with and educate students. The most fruitful conversations will identify those values and interests that either support or stand in the way of educators' ability to educate and support students. It is critical that these conversations be natural, inviting, and aspirational.

## STRATEGIES AND SUGGESTIONS

Most importantly in all your conversations, remember that people join organizations because they want to belong, affiliate, and have a sense of collective power. Consider these strategies and suggestions:

- **Assume the person will join the Association.** Start with this assumption because it changes your outlook and approach when starting the conversation. If you believe a person won't want to join or can't afford the dues, you will be defeated before you start!
- **Know and learn from your audience.** Know who you are talking with as you can anticipate relevant issues that the potential member may bring up or may be of interest to them. Tailor your talking points accordingly. Remain open to learning new things about the potential member. Strong Associations build relationships with their members and potential members.
- **Peer-to-peer conversations are best.** There is often common interests and experience between members and potential members when they work in the same department, grade level, or at the same work site.
- **Be positive and represent the Association well.** Share the value, mission, goals, and history of the local/OEA/NEA, as appropriate, to help the potential member understand the purpose of the Association and why it is relevant to them as an educator. Let the person know that the Association is the educators' professional organization with professional development opportunities.
- **Approach each and every potential member.** Some of us freeze when we have to approach a colleague to join the Association because we fear the person will say "no." But, as an Association member and leader, you have a story to tell, you know the value of your membership in the Association and can speak confidently with first-hand experience. Remember, the number one reason people give for not joining is, "No one ever approached me." Don't let that be said in your local.
- **Don't try to "sell" membership,** instead have an earnest conversation. People respond best to issues relevant to them. Find out as much as possible about who this person is, what they care about, and help them understand how the Association is available to address and meet their needs. Respond to the person's interests and issues, instead of giving the person a "canned" membership pitch. Each person needs to be approached differently. Answer their questions about the Association.
- **Use the personal approach for each potential member.** "I understand you are a new teacher. Did you know that we have a professional library and professional development that may be of assistance to you?" "I hear you were just assigned a new student as a support staff person. Did you know that we provide very useful training and resources for support staff who work one-to-one with students?"
- **Convey a friendly, helpful attitude.** Remember, you are representing your Association and positive representatives help to convey a positive organization. Regardless of what is said, keep your cool and professionalism! Exude confidence and enthusiasm. Be constantly optimistic about what the Association can accomplish.
- **Handle criticism by putting it to work.** "I'm awfully glad that you are as concerned as I am about that problem. You're just the person to join a committee we're forming to address the problem."

# Mastering the Art of a Conversation (cont'd)

- **Stress the fact that the strength and effectiveness of the Association increases as the size of the membership grows.** Our collective power means a great deal when negotiating our contract or fighting for a work site issue.
- **Working in pairs is often helpful.** A colleague who has personal credibility, or who is an avid Association member can often make a big difference in the success of the discussion. When necessary, assign a different person to go back on the second contact.
- **It's in the member's best interest!** It counts when the Association negotiates a good contract. It counts when the local Association lobbies for full funding of the contract or legislation. It counts when the Association lobbies successfully for educational change. It really counts when a member is in a jam and needs legal assistance. There's a great deal more at stake than just more members—the individual member's welfare is at stake.
- **It's people not paper!** Brochures are only a means to an end. Be strategic in your use. By themselves, printed pieces of information will almost never get a potential member to join. Most materials placed in a mailbox will not even be read. If you do use the materials, deliver them in-person and discuss them. Only use a membership material item as it makes sense for the potential member.
- **For long-time non-members, use an affirmative question** such as "What can we do to get you to become a member?" and then truly listen to their response. This approach brings people into the Association in an engaging way.
- **Always fill out the membership form as much as possible before making contact with a potential member.** If you don't have the information, at least highlight the areas that a new member needs to complete on the membership form.
- **Don't leave the membership form with the potential member.** Complete as much as possible of the membership form, including the correct dues amount. Always have a pen ready. Make an appointment and come back again.
- **Keep track of your contacts with potential members.** Make notes about the conversations you have with potential members after you meet. Record issues they raise, questions they may have, and other things that are noteworthy such as their skills and interests. Share this information with the Association in the interest of developing programs that members want.
- **Follow-up with any prospective member.** The best follow-up is always a conversation. Do this respectfully, but persistently. You can then follow-up with a note, email, or phone call.  
**Remember, people join because of a sense of belonging, shared values, and collective power.** People belong and are active in organizations when the mission and work of the organization resonates with their priorities and values. If potential members are not aware of what the Union stands for or is doing, they are less likely to join. Remember, our ultimate goal is to have active, engaged members who want to be part of the Association and continue their membership.

## THINGS YOU SHOULD NOT DO

- **Give the potential member a sales pitch** before you get to know the person and find out their interests.
- **Start off the conversation with a horror story** in hopes of offering a cautionary tale and then leading into the need for a Union. Using fear as a recruitment tool is not an ideal way to build a strong, engaged membership.
- **Assume someone will say "no"** and not approach the potential member at all, or only ask a yes/no question such as "will you join?"
- **Use OEA/NEA Member Benefits as the sole tool to recruit a member.** Member benefits are truly an asset to our members, but your Association and OEA/NEA have much more to offer beyond the Member Benefits program. Share the mission, goals, and values of the three Associations.
- **Stuff mailboxes with membership forms and notes,** and then expect those who are interested in membership to approach you. A personal, face-to-face approach is much more effective. Schedule a meeting with the potential member and get to know the person.

# Using the Membership Materials

## HOW TO USE THE NEW EDUCATOR CAMPAIGN INTEREST FORM WITH POTENTIAL MEMBERS

To support your local membership development plan, OEA is providing a **New Educator Campaign Interest Form** for you to use in your organizing activities. This form is designed to be used while having a one-to-one conversation with new educators at your work site, whether they are new to the profession or just new to the district or school.

If you are at the beginning stages of putting together your membership engagement plan, the **New Educator Campaign Interest Form** and the questions that accompany it are a great place to start.

The form is based off research of new educators by OEA and speaks to the needs of those entering the profession.


## SUPPORTING NEW EDUCATORS

In addition to helping guide your conversation with potential new members, there is space to capture personal contact information and five questions we'd like to get answers to on the form. The answers to these questions will help us better meet the needs of new members across the state.

There are two ways to capture this data. Either by filing out the form and sending to your LRC or by using the online form at <https://join.nea.org/ohio/connect/>.

OEA will send a few emails throughout the year based on an educator's response to these questions. This information will also be available for local Associations to use in making important local decisions about bargaining, membership engagement, etc.

This does not take the place of an OEA Membership Form. It is used to help us get to know potential members more in order to help support them with information during their first years of employment.



**OEA**  
OHIO EDUCATION ASSOCIATION

## Together. A Stronger Voice.

By uniting our voices, we can win the changes we need to be our best and make a real difference in students' lives. Together we're stronger. Together we're heard.

First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Personal Email: \_\_\_\_\_ Cell Phone\*: \_\_\_\_\_

Employer: \_\_\_\_\_ Worksite: \_\_\_\_\_

Home Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

\*By providing my cell phone number, I understand that the National Education Association (NEA) and its affiliates may use automated calling techniques and/or text message me on a periodic basis. The NEA will never charge for text message alerts. Carrier message and data rates may apply to such alerts.

☐ Sign me up for email updates from NEA

<b>Certified Professionals</b>	<input type="checkbox"/> Administrator <input type="checkbox"/> Classroom Teacher <input type="checkbox"/> Coach	<input type="checkbox"/> Counselor <input type="checkbox"/> Librarian <input type="checkbox"/> Occupational Therapist	<input type="checkbox"/> Psychologist <input type="checkbox"/> Reading Specialist <input type="checkbox"/> Special/Developmental Ed	<input type="checkbox"/> Speech/Hearing <input type="checkbox"/> Other
<b>Education Support Professionals</b>	<input type="checkbox"/> Clerical Services <input type="checkbox"/> Custodial and Maintenance <input type="checkbox"/> Food Services	<input type="checkbox"/> Health and Student Services <input type="checkbox"/> Paraeducator <input type="checkbox"/> Security Services	<input type="checkbox"/> Skilled Trades <input type="checkbox"/> Technical Services <input type="checkbox"/> Transportation	<input type="checkbox"/> Other
<b>Higher Education Professionals</b>	<input type="checkbox"/> Academic Professional Staff <input type="checkbox"/> Assistant <input type="checkbox"/> Faculty FT	<input type="checkbox"/> Faculty PT <input type="checkbox"/> Graduate Teaching/Research <input type="checkbox"/> Other Support Staff		

### 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)

<input type="checkbox"/> <b>Membership, Leadership &amp; Advocacy</b> <small>Talking to colleagues about joining our union to build power for members. For example, participating as an organizer, building representative, or another Association leadership role.</small>	<input type="checkbox"/> <b>Collective Action</b> <small>Helping get the word out about bargaining, meet &amp; confer, or other workplace actions.</small>	<input type="checkbox"/> <b>Leading Our Professions</b> <small>Supporting members to grow in their professional practices.</small>
<input type="checkbox"/> <b>Political Activism</b> <small>Volunteering with my union to elect pro-public education candidates from both parties—from my local school board to the White House.</small>	<input type="checkbox"/> <b>School Funding &amp; Education Policy</b> <small>Working to increase education funding at my school, district, and state.</small>	<input type="checkbox"/> <b>Thinking About It...</b> <small>I'm not ready to volunteer right now but I'm looking forward to staying informed.</small>

# Responding to Common Questions and Concerns:

## *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. These 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.

---

**Dues Costs:** *"I don't think it is worth being involved with the Union because dues are so expensive."*

**Affirm:** I can understand why you would be concerned about dues.

**Answer:** The dues are \_\_\_\_\_. The way our dues work is \_\_\_\_\_.

**Redirect:** 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."*

**Affirm:** I can understand why you would feel that way.

**Answer:** Currently, (% of members) of our colleagues pay dues to fund the bargaining of our contract.

**Redirect:** There are two ways that we get our power as a Union—money and people. 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?

**Free Riders:** *"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?"*

**Affirm:** I can understand your concern.

**Answer:** 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.

**Redirect:** 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.)

**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.

**Self-Interested:** *"I have heard that teacher Unions care more about themselves than their students. I care about the kids, I'm not selfish."*

**Affirm:** I can understand your concern.

**Answer:** 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.

**Redirect:** 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.

**Strikes:** *"My superintendent told me the only weapon that the Union has to get good agreements is to go on strike."*

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

**Answer:** 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.

**Redirect:** 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).

**Too Political/Liberal:** *"The Association should stay out of politics. I'm a Republican, not a Democrat."*

**Affirm:** That's a completely valid feeling.

**Answer:** 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.

**Redirect:** 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 Political Action Committees (PACs) and you are free to support whomever you think is best for education.





# We should all be working together to make our organization the very best it can be at representing and advocating for **all of us.**

## Enrolling New Members

OEA offers convenient Online Enrollment. The online module is extremely easy to use and requires only a few “clicks” to complete the enrollment process. “Join Now” can be accessed via the OEA website at: [www.ohea.org/why\\_belong](http://www.ohea.org/why_belong).

From the “Why Belong” web page, the new member will select “JoinNow” and will immediately begin the enrollment process. Upon completion of their enrollment, the new member will be provided a confirmation reflecting the information they submitted along with their new member ID number. This confirmation will be sent directly to the member via their email address with a copy sent to the OEA Membership Department. The local Treasurer will receive an electronic roster of all online enrollments as new members join their association.

When utilizing the online enrollment function, being familiar with and understanding the following levels of membership and the corresponding codes may be helpful to guide new enrollees as they navigate the process.

### **Active Educator Full-Time (AC-1-100)**

- Classroom teachers, professors, school nurses, pupil personnel workers that work more than half-time.

### **Active Educator Half-Time (AC-1-50)**

- Classroom teachers, professors, school nurses, pupil personnel workers that work half-time or less.
- Active educators on official leave of absence for one-half or more of the school year, and who are not paid full-time salaries. (February 1 is the date used to determine half-year leave status.)
- Substitute employees.
- Educators in reduction in force (layoff) status for one-half or more of the school year and with statutory or contractual recall or rehire rights.

### **Active Educator Quarter-Time (AC-1-25)**

- Classroom teachers, professors, school nurses, pupil personnel workers that work quarter-time or less.

### **Active Education Support Professional Full-Time (AC-2-100)**

- Paraprofessionals such as educational aides, secretaries, custodians, food service personnel, bus drivers, etc. that work more than half-time.

### **Active Education Support Professional Half-Time (AC-2-50)**

- Paraprofessionals such as educational aides, secretaries, custodians, food service personnel, bus drivers, etc. that work half-time or less.
- Active education support professionals on official leave of absence of one-half or more of the school year and who are not paid full-time salaries.
- Education support professionals in reduction in force (layoff) status for one-half or more of the school year and with statutory or contractual recall or rehire rights.

### **Active Education Support Professional Quarter-Time (AC-2-25)**

- Paraprofessionals such as educational aides, secretaries, custodians, food service personnel, bus drivers, etc. that work quarter-time or less.

The online enrollment module will assign the appropriate dues amount based on the information entered by the new enrollee. Full-time/Half-time/Quarter-time designation should be confirmed by the local association based on that individual's specific work hours. Current Dues rates can be found on the OEA website under Resources/Secretary-Treasurer page.

A paper enrollment form is also available and can be obtained by the local association by contacting the OEA Membership Department at [membership@ohea.org](mailto:membership@ohea.org) or by calling 1-844-632-4636. Hours are Monday through Friday, 8:30AM – 5:00PM.

# Member Advocacy: Rights and Protection

## WEINGARTEN RIGHTS

What do you do if you are asked to attend a meeting with your manager for an unspecified reason?

**1. Ask the manager to clarify the reason for the meeting.**

**2. Remember that you are entitled to representation.**

Administrators are not obligated to tell you this; but, if you request representation, the administrator must arrange the meeting at a time your representative can be in attendance.

**3. If called into a meeting with management, read the following statement to management before the meeting starts:**

*"If my responses to your questions could lead to me being disciplined or terminated, or adversely affect my personal working conditions, I respectfully request that you summon my Union representative. Until my representative arrives, I choose not to answer any questions."*

**We suggest representation any time the purpose of the meeting is one of the following:**

- Any type of disciplinary action
- Investigation meeting
- Reprimand
- Infraction of a work rule or board policy
- Questions concerning a request or use of any leave
- Allegations of abuse
- Parental, student, or community complaint
- Check with your OEA LRC for more assistances

## IF A MEMBER IS ASSAULTED

If a member is the victim of an assault while on school property, the following procedures are recommended:

- Write down as soon as possible, after the assault incident, all particulars of the situation, including names, witnesses, date, time(s), location, and general conditions.
- Contact the proper school authorities.
- Contact the local Association and/or LRC.
- Have the person determine his/her rights to assault leave under the Ohio Revised Code or the collective bargaining agreement.
- Take pictures, if relevant and possible, of injuries or property damage.
- Get a doctor's statement if there is even a remote possibility of personal injury.
- File all appropriate police reports.
- Press charges against the assaulting student(s) or others.
- Avoid talking to anyone representing the student or others without prior counsel.
- Remember, members may be covered by the OEA/NEA Legal Services Program.

## FOR MEMBER PROTECTION

Under Ohio law, public employers bear responsibility to indemnify their employees against certain tort claims for acts occurring within the scope of their employment. However, as OEA members, individuals have the additional protection of \$1 million in professional liability insurance. This program provides for:

- **Liability Protection.** Payment of up to \$1 million in damages assessed against a member as a result of a lawsuit. There is a \$3 million aggregate limit per occurrence for this coverage. This is excess coverage, meaning that it is available when the employer declines to provide coverage or where liability limits are exceeded.
- **Legal Costs.** Payment of legal costs in defending such cases.
- **Civil Rights.** Payment of up to \$300,000 in damages, attorney fees, and court costs if a member is charged with the violation of the civil rights of an individual.
- **Criminal Cases.** Reimbursement of attorney fees and other legal costs up to \$35,000 if a member is charged with violating a criminal statute in the course of employment provided the member is found innocent of the charges, the charges are dropped or charges are not filed after an investigation. If charges stem from an incident involving corporal punishment, the member can be reimbursed up to \$35,000, regardless of the outcome of the case.
- **Bail Bond.** Reimbursement of up to \$1,000 of the bail bond premium if the member must post bond.
- **Personal Property Damage.** Payment of up to \$500 for damages to personal property when caused by an assault in the course of employment. If you believe there is a claim under the liability protection program, contact your local OEA/NEA Labor Relations Consultant immediately.

*Please note: This is not a full description of the coverage. For a complete description of OEA/NEA liability coverage, please contact your Labor Relations Consultant (LRC).*

# Member Advocacy: Education Policy Engagement

*Thousands of OEA members are actively engaged in OEA's grassroots efforts because they know that virtually every important decision involving our schools and classrooms is ultimately made by politicians. Elected officials determine which tests our students must take, how our district evaluation systems are created, the performance classification criteria for our schools and school districts, our compensation, and many other important matters that affect us. The funding received for public education comes from the federal, state, and local levels, so we must engage in public policy matters that will impact our students. It is your expertise and commitment to students that makes you uniquely qualified to speak up about public education needs and its value to our society. We have a professional responsibility to organize our members around issues that impact quality teaching and student learning. We must stand up for children and public education, and collectively we can make difference.*

## BE INFORMED

As a worksite leader, keep up-to-date on what is happening at the school district, state, and national levels. Attend your scheduled local Association meetings to keep current on the activities in your school district. Subscribe to the OEA Legislative Watch to stay informed on important issues at the state and federal levels. Go to [www.ohea.org/get-involved/legislative-watch](http://www.ohea.org/get-involved/legislative-watch), to subscribe online.

## SHARE INFORMATION

Collect home emails and cell phone numbers for all your members so you have a way to communicate with them on educational issues as necessary. It is also helpful to have this home contact information to keep in touch over holiday breaks and summer vacation. During monthly school site meetings, include some updates on education policy matters (which you can find on the OEA or NEA website and by subscribing to the OEA Legislative Watch—see above). Post relevant information on your local Association's bulletin board.

## ENGAGE MEMBERS

Many teachers and school employees want to be involved, they just don't know how they can make a difference. That's where you come in. By staying informed about education policy matters, you are in a unique position to organize others to help elect candidates who will be supportive of public education. This engagement can begin at the ballot box and transition to relationships once candidates are elected to office.

### *Ideas on ways to engage your members:*

- Help each staff member sign up for the OEA Legislative Watch. Parents can sign up too.

- Find volunteers to support your local Association's recommended school board candidate or other recommended pro-education candidate campaigns. You can walk neighborhoods and make phone calls in support of your candidate. This is invaluable to the candidate, and they will be grateful for your assistance once they get elected.
- Engage your members and parents in campaigns around education funding—from passing a district's levy or override or working on ballot issues to raise K-12 funding statewide.
- Fundraise for your local Association's, The OEA Fund, and NEA's Political Action Committees (PAC). This is money that is raised separately from dues dollars that can be spent to help elect candidates to the state legislature, congress, and school board or to help pass bonds and overrides at the local level.

## ENGAGE POLICYMAKERS

Work with your local Association leadership to invite legislators and school board members to come to your school for a visit. Be sure to check with your work site administrators as well. Letting policymakers see the work we do on a daily basis gives them context for some of the struggles we face (such as large class sizes, not enough textbooks, overwhelming challenges, outdated equipment and buses, etc.). Plan a full-day or half-day of activities so the policymaker gets to see a variety of classrooms on campus. Don't worry about things being perfect, these individuals need a first-hand experience about what teachers or support employees face daily. A real eye-opener is the limited amount of time you have to eat lunch. Engaging policymakers on our campus puts them at our level where we are the experts. These visits can lead to members growing more interested in education policy matters because they have met the people who make the decisions that impact them and their students.

## RESOURCES

OEA: [www.ohea.org](http://www.ohea.org)

OEA Foundation: [www.ohea.org/oea\\_foundation](http://www.ohea.org/oea_foundation)

NEA: [www.nea.org](http://www.nea.org)

OEA Fund: [www.ohea.org/donate](http://www.ohea.org/donate)

Ohio Legislature: [www.ohea.org/get-involved/legislative-watch](http://www.ohea.org/get-involved/legislative-watch)

NEA Fund: [www.neafund.org](http://www.neafund.org)

# Member Advocacy: Teacher Contracts and Licensing

## THE TEACHER CONTRACT

Ohio teachers work under one of two basic types of contracts: limited or continuing.

**Limited contracts** must be renewed periodically. State statute or your collective bargaining agreement determines the procedure the employer must use to non-renew a limited contract.

**Continuing contracts** remain in effect until a teacher resigns, voluntarily retires, is suspended, terminated for cause, or dies.

**Supplemental contracts** are limited contracts issued for extra duties assigned beyond the regular teaching assignment. Contracts must set forth in writing the additional duties to be performed and must specify compensation to be paid for that assignment. Supplemental contracts should cover all educational responsibilities outside the regular teaching assignment other than voluntary duties. There is no notice requirement for termination of supplemental contracts, unless otherwise negotiated in a collective bargaining agreement.

## TYPES OF LICENSES

*\*Please note that professional educators are responsible for knowing and understanding all requirements for the renewal and/or advancement of their Ohio teaching license.*

**Resident Educator License (Four-Year)** – Upon completion of an approved teacher education program and successful passage of required OAE's graduates may acquire a resident educator license. Upon obtaining full-time employment with the resident educator license, they will be enrolled in a four-year resident educator program. The resident educator license may be extended on a case-by-case basis by the Ohio Department of Education. ([education.ohio.gov](http://education.ohio.gov))

**Professional Educator License (Five-Year)** – Conversion from the Resident (four-year) Educator to Professional Educator (five-year) license requires the successful completion of the four-year resident educator program and summative assessment. For applicants seeking Early Childhood Education, Middle Childhood Education, and Intervention Specialists Licenses, see "Reading Requirement" below.

**Senior Professional Educator License (Five-Year)** – Advancement to the Senior Professional Educator License is a voluntary action and requires the following:

1. Master's Degree from an Ohio accredited institution of Higher education (in area of licensure)
2. Nine years of teaching experience under a standard teaching license with at least five years under a professional/ license/certificate (years of service = 120 days)
3. Master Teacher Designation\* through the district's local professional development committee (LPDC)

**Lead Professional Educator License (Five-Year)** – Advancement to the Lead Professional Educator License is a voluntary action and requires the following:

1. Master's Degree from an Ohio accredited institution of higher education (in area of licensure)
2. Nine years of teaching experience under a standard teaching license with at least five years under a professional license/certificate (years of service = 120 days)
3. Master Teacher Designation through the district's LPDC AND the Ohio Teacher Leader Endorsement; OR active National Board Certification.

*\*Master teacher status must be renewed every five years.*

### Reading Requirement for Teachers:

Ohio requires a minimum of 12 semester credit hours, or the equivalent, in reading including phonics. Licensed teachers should determine whether they need to take additional hours in reading to meet the 12-hour requirement.

# Member Advocacy: Teacher Contracts and Licensing

**Renewal Professional License (Five-Year)** – The educator must successfully earn six (6) semester hours or 18 Continuing Educational Units (CEUs) according to an LPDC-approved Individual Professional Development Plan and in accordance with LPDC criteria for professional development.

*For more information about the Ohio licensure standards, including fees for application, contact the Ohio Department of Education (ODE), 25 S. Front St., Columbus, OH 43215, (614) 466-2006, or visit the website at [www.education.ohio.gov](http://www.education.ohio.gov).*

*An LPDC must pre-approve an individual's professional development and verify that it meets the requirements for renewal before ODE will act on an application for renewal. For current licensure fees, visit ODE's web site and use the search term "Educator License Applications."*

## PROFESSIONAL DEVELOPMENT FOR LICENSURE RENEWAL

An educator's Individual Professional Development Plan (IPDP) must be filed with and approved by the Local Professional Development Committee (LPDC) prior to earning college credit for course work and CEUs to renew a license or advance a license.

**ATTENTION:** All licensed educators must complete all licensure renewal steps online. Please visit the renew a license page at <http://education.ohio.gov/Topics/Teaching/Licensure/Renew-Certificate-License>, once LPDC requirements have been met. Because all educator licenses expire on June 30 of the final year of validity, individuals are advised to complete online renewal steps well before the end of the school year. Failure to renew the license on or before expiration on June 30 will invalidate the license and potentially affect employment. The online process allows educators to renew or transition a license throughout the year.

## IMPORTANT TEACHER DATES

### June 1

Teachers with limited contracts that expire in the current year must be observed formally a minimum of three times by May 1 and must be notified in writing no later than June 1 of the board of education's nonrenewal action based on the superintendent's written recommendation not to re-employ. Failure of a board to provide such notice automatically results in re-employment. Each non-renewed teacher is entitled to a written statement of circumstances surrounding the nonrenewal and to a board of education hearing. Check your locally bargained contract to make certain these requirements have not been modified.

### June 1

Unless teachers notify the board of education in writing to the contrary by June 1, they are presumed to have accepted re-employment under the provisions of the contract offered by the board unless the teacher notifies the board to the contrary on or before June 15.

### July 1

If teachers have a valid outstanding contract, they must be notified in writing by July 1 of their salary for the coming school year. The salary may be increased due to schedule improvements through negotiations.

### July 10

A teacher with a contract covering the ensuing school year is free to resign after the current school session up to July 10 with five days' notice. After July 10, the teacher must have the board's consent or face a possible suspension of up to one year of his or her Ohio teaching license by the State Board of Education.



# Member Advocacy: Teacher Retirement, Termination, and Discrimination

## TEACHER RETIREMENT

Public education employees need and deserve stable and secure retirement benefits. For OEA members, Ohio's retirement systems represent our economic security in retirement. Defined benefit pension plans offer stable retirement income that a member cannot outlive. Pension benefits are funded by contributions by an employee and their employer during their working years. OEA advocates for policies that will keep members' retirement benefits secure and ensure the long-term health of the retirement systems. This includes maintaining the defined benefit plans, avoiding benefit reductions or underfunding, and access to affordable health care in retirement. OEA also screens and endorses qualified candidates for the retirement system boards to ensure that decisions are made in the best interests of the members. Teachers, other licensed educators, and higher education faculty contribute to the State Teachers Retirement System (STRS).

**For more information concerning your retirement benefits, contact STRS:**

STRS, 275 E. Broad St., Columbus, OH 43215-3771, (888) 227-7877, [www.strsoh.org](http://www.strsoh.org)

## TERMINATION OF BENEFITS

If a teacher ends employment covered by STRS, deposits may be left in the system or withdrawn. Before making that decision, the teacher should make a thorough study to see which is more beneficial.

**What Teachers Pay:** Teacher contributions to STRS are at 14% of pay. STRS membership provides three types of financial protection: (1) survivor benefits; (2) disability retirement benefits for the STRS member; and (3) service retirement benefits.

**Other Features:** For the retired teacher, access to optional health care benefits are offered, for a fee, that also can cover spouses and eligible dependents.

## DISCRIMINATION

Title VII of the Civil Rights Act of 1964, as amended, Title IX of the Educational Amendments of 1972, the Americans with Disabilities Act of 1990, the Family and Medical Leave Act of 1993, and various Ohio state laws offer protection against discrimination in the areas of supplemental salaries, pregnancy leave, promotion, termination, transfer and other areas. If a member believes they are being discriminated against for legally proscribed reasons, the member should contact their OEA/NEA Labor Relations Consultant.



# Member Advocacy: Education Support Professionals (ESP) Contracts

## THE ESP CONTRACT

Ohio Education Support Professionals (ESP) contracts vary depending on the type of employing school district. Local and exempted village school districts grant employees a one-year contract, followed by a two-year contract and then a continuing contract. City school employees are known as classified employees. A classified employee has a similar status to a continuing contract employee and may be terminated only for certain enumerated statutory reasons.

Classified employees are required to serve a probationary period. A probationary employee can be dismissed for unsatisfactory service at any time after the completion of 60 days or one-half the probationary period, whichever is greater. The probationary period can last from 60 days to one year.

***If you are covered by the civil service laws, the following information may not apply to you. Check with your OEA LRC for more information.***

## IMPORTANT ESP DATES

**June 1:** Employees with one- or two-year contracts that expire in the current school year must be notified in writing no later than June 1 if they are not to be re-employed. Failure of a board to do so automatically re-employs them.

**July 1:** If employees have a valid outstanding contract, they must be notified in writing by July 1 of their salary for the coming school year. The salary may be increased due to schedule improvements through negotiations.

## ESP RETIREMENT

Public education employees need and deserve stable and secure retirement benefits. For OEA members, Ohio's retirement systems represent our economic security in retirement. Defined benefit pension plans offer stable retirement income that a member cannot outlive. Pension benefits are funded by contributions by an employee and their employer during their working years. OEA advocates for policies that will keep members' retirement benefits secure and ensure the long-term health of the retirement systems. This includes maintaining the defined benefit plans, avoiding benefit reductions or underfunding, and access to affordable health care in retirement. OEA also screens and endorses qualified candidates for the retirement system boards to ensure that decisions are made in the best interests of the members. Education Support Professionals (ESPs) and non-teaching employees of community colleges are members of the School Employees Retirement System (SERS). Non-teaching employees of state colleges and universities or county boards of developmental disabilities contribute to the Ohio Public Employees Retirement System (OPERS).

***For more information concerning your retirement benefits, contact SERS or OPERS:***

SERS, 300 E. Broad St., Suite 100, Columbus, OH 43215-3746, (614) 222-5853 or (866) 280-7377, [www.ohsers.org](http://www.ohsers.org)

OPERS, 277 E. Town St., Columbus, OH 43215, (800) 222-7377, [www.opers.org](http://www.opers.org)

## ESPs AND CORPORAL PUNISHMENT

Corporal punishment is prohibited in all Ohio public schools. Ohio law allows the use of such amount of force and restraint as is "reasonable and necessary" to quell a disturbance which threatens physical injury to others, to obtain possession of weapons or other dangerous objects within the pupil's control, for the purpose of self-defense, or for the protection of persons or property.

## OVERTIME PAY AND COMPENSATORY LEAVE

The Fair Labor Standards Act and Ohio law provide that Education Support Professionals who work more than 40 hours per week shall receive overtime pay at time and one-half or compensatory time at the same rate—one and one-half hours paid leave for every hour of overtime worked. More favorable terms may be bargained collectively. The law also defines the standard work week as 40 hours for ESPs.

# Important Contacts

## **BROADCAST EDUCATIONAL MEDIA COMMISSION (eTech Ohio)**

2470 North Star Rd., Columbus, OH 43221-3405  
(614) 485-6000; Toll Free (877)-383-2406  
[www.broadcast.ohio.gov](http://www.broadcast.ohio.gov)

## **NATIONAL EDUCATION ASSOCIATION**

1201 16th Street, N.W., Washington, D.C. 20036-3290  
(202) 833-4000  
[www.nea.org](http://www.nea.org)

## **NEA MEMBER BENEFITS – OHIO/KENTUCKY/WV REGIONAL OFFICE**

Affiliate Relations Specialist: Guy Kendall-Freas  
1217 Monterey Drive, Mansfield, Ohio 44907  
(888) 749-7380; Fax: (301) 956-1939  
[GKendall-freas@neamb.com](mailto:GKendall-freas@neamb.com)

## **OHIO DEPARTMENT OF HIGHER EDUCATION**

25 S. Front Street, 7th Floor, Columbus, Ohio 43215  
(614) 466-6000; Fax: (614) 466-5866  
[www.ohiohighered.org](http://www.ohiohighered.org)

## **OHIO DEPARTMENT OF EDUCATION**

25 South Front Street, Columbus, Ohio 43215-4183  
(614) 995-1545; Toll Free (877) 644-6338  
Office of Educator Licensure: (614) 466-3593  
[www.education.ohio.gov](http://www.education.ohio.gov)

## **OHIO EDUCATION ASSOCIATION**

225 E. Broad Street, Box 2550, Columbus, Ohio 43216-2550  
(614) 228-4526; Toll Free (800) 282-1500  
[www.ohea.org](http://www.ohea.org)

## **OHIO HIGH SCHOOL ATHLETIC ASSOCIATION**

4080 Roselea Place, Columbus, Ohio 43214  
(614) 267-2502  
[www.ohsaa.org](http://www.ohsaa.org)

## **OHIO PUBLIC EMPLOYEES RETIREMENT SYSTEM**

277 East Town Street, Columbus, Ohio 43215-4642  
Toll Free (800) 222-7377  
[www.opers.org](http://www.opers.org)

## **SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO**

300 E. Broad St., Suite 100, Columbus, Ohio 43215-3746  
(614) 222-5853; Toll Free (866) 280-7377  
[www.ohsers.org](http://www.ohsers.org)

## **STATE TEACHERS RETIREMENT SYSTEM OF OHIO**

275 East Broad Street, Columbus, Ohio 43215-3771  
(614) 227-4090; Toll Free (888) 227-7877  
[www.strsoh.org](http://www.strsoh.org)

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OHIO EDUCATION ASSOCIATION

225 E. Broad St., Box 2550, Columbus, OH 43216  
614-228-4526 | 800-282-1500

[www.ohea.org](http://www.ohea.org)



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[facebook.com/OhioEA](https://facebook.com/OhioEA)



**INSTAGRAM**  
[instagram.com/OhioEA](https://instagram.com/OhioEA)



**TWITTER**  
[twitter.com/OhioEA](https://twitter.com/OhioEA)



**YOUTUBE**  
[youtube.com/user/OhioEdAssoc](https://youtube.com/user/OhioEdAssoc)



**PINTEREST**  
[pinterest.com/OhioEA](https://pinterest.com/OhioEA)