

A photograph of a woman with dark hair and glasses, wearing a black top, smiling and looking towards a man in a white shirt who is seen from the back. They appear to be in a modern office or meeting space with green partitions in the background.

Membership Training Guide

OEA

OHIO EDUCATION ASSOCIATION



OHIO EDUCATION ASSOCIATION

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

www.ohea.org

ORGANIZING AND MEMBERSHIP ENGAGEMENT
organizing@ohea.org | 614-227-0046 | 866-427-0046

Membership Training Guide © Ohio Education Association 2022



Table of Contents

INTRODUCTION

Using the Membership Training Guide	4-5
---	-----

MODULE 1 | Work Site Checkup

What Does a Well-Organized Work Site Look Like?	6
Give Your Work Site a Checkup	7

MODULE 2 | Talking to New Educators and New Hires

Tips for the Basic Organizing Conversation / Reminders on Active Listening	8-9
One-to-One Conversations with New Educators ("ISAHUEY" Model)	10
The Invitation to Membership	11

MODULE 3 | The Value of Membership

What is Your Why?	12
Top 10 Reasons to Belong	13
B.R.A.G. Sheet	14
Building Relationships	15
Members Want	16-19

MODULE 4 | Dues and Tough Questions

Your Dues Dollars at Work	20
How Your 2022-2023 Dues Dollars Are Allocated	21
Answering Tough Questions: Affirm-Answer-Redirect	22-23

MODULE 5 | Mapping

Basic Mapping: Learning the System	24
Mapping on the Roster	25
Advanced Mapping: Connections and Trends	26
Points of Influence: Mapping Those Who Have Influence Over Others	27
Sample Power Mapping Brainstorm Plan	28
Suggested Planning and Logistics for Work Site Visits	29

MODULE 6 | New Educator Recruitment and Retention

What is the New Ed Campaign?	30
New Educator Campaign Interest Form Talking Points (Sample NEO Presentation)	31
Simplified Back-to-School Process and Checklist	32-33
Sample Letter for New Employees	34-35
Sample Back-to-School Conversation Frame	36
Notes	37

Introduction

The kind of Union power that OEA and locals are trying to build — power that can bring about meaningful, positive change in the lives of members, their students, and communities they serve — isn't a static thing.

It takes consistent work to build and maintain this power. If we do nothing, it begins to deteriorate almost immediately in important ways that can sometimes be hard to notice. Keeping membership growing and engaged is the most important way to build and maintain power.

This training guide is designed to be utilized by Local Presidents, District Leaders, and/or Labor Relations Consultants (LRCs) / OEA Staff when training Worksite Representatives and member leaders to prepare them to conduct successful membership campaigns that build Union power.

For an extended Train-the-Trainer, please contact us at: organizing@ohea.org



Using the Membership Training Guide

MODULE 1 | Worksite Checkup

As the visible manifestation of the Union for new educators, it is essential that Worksite Representatives understand their role in supporting, recruiting, retaining, and engaging new educators. This module is designed for Worksite Representatives to complete as an expectation of roles and to spark further discussion. In well-organized local Associations, Worksite Representatives are part of the local's distributive leadership structure of communication, contract enforcement, new member recruitment, engagement, and resource distribution.

MODULE 2 | Talking to New Educators + New Hires

One-to-one conversations with new hires are essential to building their relationship with the local Union and gathering data on the potential member with the **New Educator Campaign Interest Form**. This module provides a framework for locals to train their Worksite Representatives for authentic organizing conversations with a new hire in their building, incorporating reminders on educating the new member on their Union, active listening, and making the invitation to membership.

MODULE 3 | The Value of Membership

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

HOW TO TRAIN, SHORT EXPLANATION:

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

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

MODULE 4 | Dues + Tough Questions

It is essential to understand and explain our unified membership dues structure to new potential members. This training provides the local leader or staff with best practices around asking questions related to dues so that it is properly messaged and transparently explained.

This module also provides a page for explaining the NEA's dues spending for potential members, including the calculation of how dues are budgeted to fund the various programs and services offered by the Union.

MODULE 5 | Mapping

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

MODULE 6 | New Educator Recruitment + Retention

The New Educator Engagement, Recruitment, and Supports campaign "New Ed" is a critical part of the OEA's year-round membership strategy. In a world of changing Union membership, OEA and our locals can continue to build power by scaling up new member recruitment and engagement.

Through intentional engagement with the next generation of new educators and Association Leaders, this process will cultivate a culture of relational organizing, destroy the myth that our Union's best days lay in the past and build a lifelong loyalty through face-to-face contact, direct digital communications, and professional supports.

PDFs of this guide and other member supports can be found at: <http://www.ohea.org/supports>

MODULE 1

Work Site Checkup

What Does a Well-Organized Work Site Look Like?

The local Association is highly visible in the work site to members, potential members, and the administration.

- ☐ Worksite Representatives and Association Leaders make regular walk-throughs and have relationships with all members and potential members.
- ☐ There is at least one Worksite Representative in every work site.
- ☐ Membership and building meetings happen regularly, are well attended, and are noticed by administration and potential members.
- ☐ Worksite Representatives are valued, respected, and trained by local leaders on an ongoing basis.
- ☐ There is regular communication throughout the work sites through up-to-date bulletin boards, member-to-member communications, flyers, newsletters, social media, websites, texting, and phone calls.

The local Association defends and enforces the contract and work standards.

- ☐ Members mobilize and use collective action to resolve everyday problems. Grievances are not the primary line of defense.
- ☐ Negotiations are transparent and members are engaged and participate in the bargaining process.
- ☐ Contracts are available and distributed to the membership both electronically and in print.
- ☐ Worksite Representatives are trained and empowered to resolve problems at the lowest level.
- ☐ Administration does not act unilaterally or abusively, because they know that they will meet unified resistance.

Members own their Union.

- ☐ Members feel that their Union is strong and resolves problems.
- ☐ Worksite Representatives provide members immediate access to resources to resolve their problems.
- ☐ Members participate in Union-wide programs and campaigns.
- ☐ Members are politically active in their local and community and discuss the importance and impact that elections have on their profession and in public education overall.
- ☐ Members are proud they belong to their Union.
- ☐ Social events are well attended.

Leaders should utilize the **Local Assessment Tool** to get a full understanding for building their local capacity. For more information, please contact your OEA Labor Relations Consultant or the Organizing Membership and Engagement Department at organizing@ohea.org.

Give Your Work Site a Checkup

Rate each statement with this scale.

1. The statement is **very true** of this work site
2. The statement is **mostly true** of this work site
3. The statement is **true but only in some areas** of this work site
4. The statement is **barely true or false** of this work site

- _____ The Union is relevant and visible in the work site to members and administration.
- _____ Worksite Representatives or Association Leaders make regular walk-throughs and have relationships with all members and potential members.
- _____ There is a Worksite Representative in every work site.
- _____ Membership meetings happen regularly, are well-attended, and noticed by others.
- _____ Union leaders attend every New Employee Orientation (NEO).
- _____ There is regular communication via updated bulletin boards, member-to-member communication, flyers, and newsletters, etc.
- _____ The Union defends and enforces the contract and work standards.
- _____ Members mobilize and use collective action to solve everyday problems. Grievances are not the primary line of defense.
- _____ Contracts are widely available and promptly distributed, both electronically and in print.
- _____ Worksite Representatives are trained and empowered to resolve issues at the lowest level.
- _____ Administrators do not act unilaterally or abusively, because they know they will meet resistance.
- _____ The Union is strong and can resolve problems.
- _____ Worksite Representatives provide members immediate access to resources to resolve their problems.
- _____ Members participate in Union-wide programs and campaigns.
- _____ Members are proud they belong to the Union.
- _____ Union Leaders know who is a member and who is a potential member.
- _____ Social events are well attended.

MODULE 2

Talking to New Educators & New Hires

Tips for the Basic Organizing Conversation

Recent generations of new educators grew up barraged by advertising and media spin. Thus, they are primed to recognize when a message is inauthentic. Don't follow a script, but rather, allow your conversations to begin on things that are immediate or important to the member. But think of this outline and script as framework to guide union conversations.

These steps can help you move towards the goal, so your colleague isn't left feeling like their time has been wasted with a spiel or gripe session. Done right, an organizing conversation leads to action.

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

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



Discover the ISSUES:

Begin by asking questions—and listening to the answers—to learn what your new colleague cares about. Make your questions open-ended, especially when you are getting to know someone.

When organizing around a particular issue, your questions may get more pointed. Still, even if you are dealing with a very pointed single issue, don't leap straight into "Will you sign this?" Instead, ask: "What are you most anxious about at the start of the year?"

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

AGITATE—Go deeper on the issue:

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

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

Educate/Build a Vision—The Union Difference:

Now that you've begun to know their story, it is time to offer them hope. Hope comes from your power in numbers and a winnable plan. You could say something like: "Let me tell

you about our Union because I think you will find it a great place to connect with other educators from across the district: (recent victory, proudest movement, what we won recently, who the Union Representative is). That is what it means to act like a Union. It is us coming together to change things that need to be changed, and secure what is going well. What do you think?"

Call the question—MAKE THE ASK:

Ask the new educator to be a part of the solution by taking a specific action. For this campaign the specific action is to fill out the *New Educator Campaign Interest Form* and Join their Union.

Helping them through this will be a lot easier when you're inviting them to action on what they've already said—not pushing an action you're trying to "sell." Every invitation to membership should be rooted in **values and interests of the potential member**.

Set a follow-up plan:

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

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

Reminders on Active Listening

Avoid Distractions. Look the other person in the eye, and put your phone away.

Slow Down. Our brains process thoughts four times faster than spoken words. It's easy to skip ahead in a conversation, using your assumptions to fill in the gaps and plan your response. RESIST this urge. Focus on what is actually being said.

Do Not Interrupt. Take the time to hear the full story.

Keep an Open Mind. Don't presume you already know what someone cares about just because of generational assumptions. People will surprise you.

Do Not Fish. Avoid leading questions like "Don't you agree that..."

Practice Empathy. Sometimes people need to let off steam. Don't discourage them. Your immediate task is to hear what they have to say, NOT to judge.

Show that you hear what they are saying. React, ask follow-up questions, and repeat back what you understood. If you don't understand, ask.

Find Common Ground. You don't have to agree with every point, but look for areas of agreement, and acknowledge where you differ.

Don't Feel You Need to Sell Something. An organizer is not a salesperson. You're genuinely looking to learn the other person's point of view and create something new together.

One-to-One Conversations with New Educators

("ISAHUEY" Model)

Introduction

Who are you? Why do you want to talk?

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

(80% Listen/20% Talk) Share your story, ask questions, and prompt reflection. *"Why did you become an educator? What do you love about this work? How did you come to be here?" "What are you most excited about for this school year?"*

Agitate

Validate their issues. *"I understand that." "How does that make you feel? Is that frustrating?" "What is the impact on you? Your students? Your family?"*

Hope/Vision of the Union/Plan to Win

Why is the UNION the solution?

What can we collectively do together to fix the problem?

Urgency

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

Educate

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

Your Ask for Commitment—Call the Question

Don't beat around the bush: Ask a yes or no question!

Potential members—*"Will you belong to the only Association fighting for educators and our students?"*

Members/ Supporters—Give them assignments *"With your help, we can make a change...but we can't do it without you." "Are you ready to take action to move a positive change forward?"* (e.g.—meet again to continue discussion, join the Union, sign a commitment card to engage in further action, etc.)

Other Reminders

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

The Invitation to Membership

As our Union reality changes, we must learn new strategies and approaches. Rather than allowing our Union's 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.

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 do that. 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."

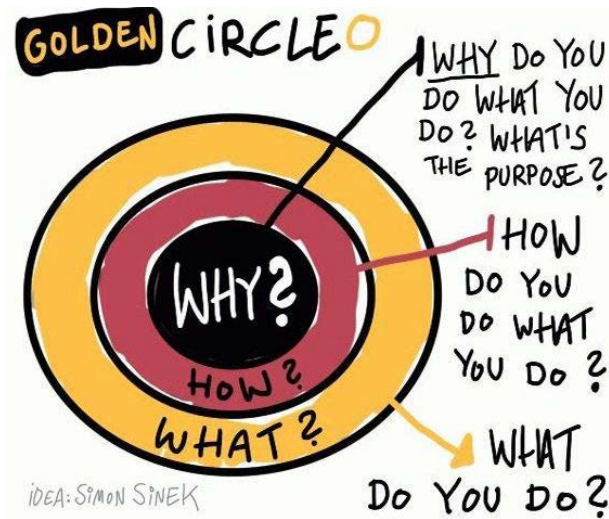
MODULE 3

The Value of Membership

What is Your Why?

Show this video before starting this portion:

Simon Sinek — Start with Why: <https://bit.ly/2ToWzio>



What is my individual Why? Why is public education important to me? Why did I become an educator?

What's my Union's collective Why? Why does my Union exist and why should anyone care?

TOP 10 REASONS TO BELONG



Support and Relationships



Influence and Power



Protection and Advocacy

1

A voice at the table

There's power in numbers. Belonging to your OEA and your local Association gives you greater influence over the decisions that affect your students, your classroom, and your career. Whether you advocate for changes at your work site, speak at school board meetings, advocate for increased school funding at the state and local level, or lobby your state legislators and city/county board members, we will support you.

2

Increased pay and benefits

As part of your Association, you can advocate for professional pay, health care, and retirement security so a career in education is a viable profession.

3

Improved professional practice

Your local helps you advocate for access to high-quality professional development and increased collaboration time so you can improve your practice. Your Association (and that means you and your co-workers!) can work with the administration to develop mentoring and other support from experienced colleagues.

4

Nationwide community of educators

When you are a member of your local Association, you are also a member of your OEA and the National Education Association (NEA). Your Association is your way to connect with like-minded colleagues across the district, state, and nation who are working to better students' lives.

5

Improved working and student learning conditions at your work site

Your Association empowers educators to advocate for smaller class sizes, less standardized testing, input into the curriculum, and safe buildings, just to name a few. These working conditions mean a better learning environment for your students.

6

Positive change in your work site

Your Association can work with the administration as a partner and collaborate with parents and community organizations to resolve issues in your school. As an educator who works with students, you can work with the administration to solve problems together.

7

Enhanced rights

A collective bargaining agreement is an enforceable legal document that protects your rights. It contains a formal procedure for advancing grievances with the support of an expert (Labor Relations Consultant). Your Association will be there to offer guidance, advice, and, if necessary, legal representation.

8

Commitment to social justice

As a member of your Association, you join forces with fellow educators to make a difference in the social justice issues that matter most to you. Your Association can provide the training and strategies needed to help achieve equity in your schools.

9

Liability protection

Because the liability potential can be so serious for individuals employed by schools and other educational units, your OEA provides all eligible members with professional liability insurance through the Educators Employment Liability (EEL) Program.

10

Member benefits

Improve your buying power and save money with NEA's Member Benefits program that offers extensive member-only benefits and discounts.

B.R.A.G. Sheet

BENEFITS

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

RESOURCES

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

ACHIEVEMENTS

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

GOALS

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

Building Relationships

Think about the people closest to you. The connection you feel for them is strong. You want to make sure they stay an important part of your life. The same holds true for educators and the Union. The depth of the relationship between the member and the Union is the best predictor of how educators will respond when faced with the possibility of dropping their membership. The stronger the connection, the more likely members are to join or stay in the Union. So what can we do to develop such strong, enduring bonds?

Here's what members had to say:

Face-to-face communication is important.

Members who received an in-person or face-to-face invitation to join are more likely to view the Association favorably than those asked to join by card or email.

Small group and one-to-one contacts are ideal.

Small group and one-to-one settings are best for having informal or face-to-face conversations that lead to authentic connections.

Our members want a Union that listens.

The best way to connect with members is to listen. Our members want to be heard—someone to listen to their concerns, challenges, successes, and achievements.

Our members want to feel supported.

Members feel good when they feel supported on the job. Our members are the best sources of support and encouragement for each other and belonging to the Union fosters solidarity and collaboration.

Relationships require care.

Relationships require care and maintenance. Relevant and ongoing communication helps to maintain and strengthen members' connections to the Union.

Tactics:

We support our members and listen to their concerns. This means we follow through on our promises, support them, and that they're connected to their Union.

Build a team and facilitate conversations:

Find other members who are willing to help. Small groups are an effective way of building stronger communications with members.

Schedule calendar check-ins and make them regular:

Let members know you're there, schedule a time for a check-in to ask how they're doing. Don't go alone, bring another member with you. Create a routine time for you to connect with and listen to your members.

Authentically listen and follow up:

Don't dominate conversations — ensure that you're listening. If a member has mentioned a need, follow up and connect them with some of the many OEA or NEA resources along their career pathways. The **OEA New Teacher**, **New ESP**, and **Aspiring Educator Guides** offer several resources to assist members.

Use data to drive conversations and plan opportunities:

If a potential member has completed a **New Educator Campaign Interest Form**, follow up on the interests they expressed with answers or resources offered from their Union—this can be scaled up with larger events like professional development offerings.

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 ongoing 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 ongoing.
- 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.

MODULE 4

Dues and Tough Questions

Your Dues Dollars at Work

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

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

AS AN EXAMPLE:

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

	Certified Full-Time Professional		Education Support Professional (ESP)	
	Cost	Per Pay Period	Cost	Per Pay Period
NEA**	\$204.00/ Annual		\$122.50/ Annual	
OEA & UniServ**	\$562.00		\$313.50	
District EA				
Local EA				
Total Cost				

***Dues for the 2022-2023 school year*

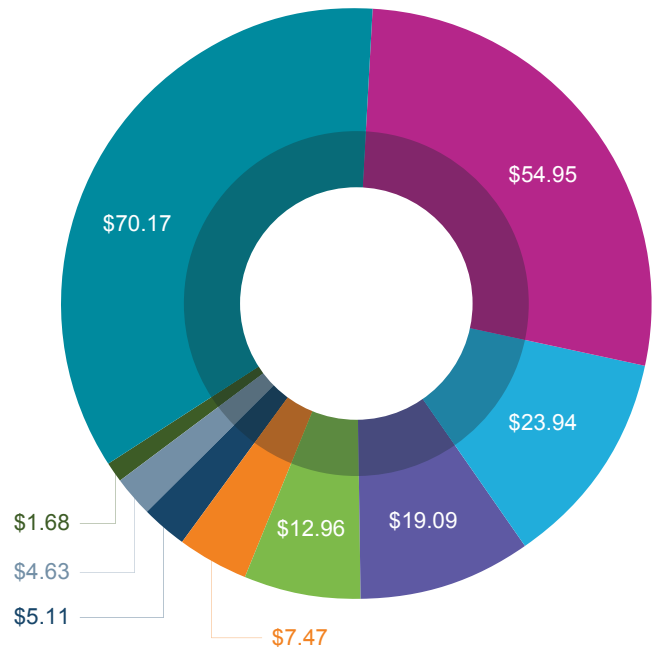
Dues Fact Check

- ✓ Dues are a collective investment and a way to build power for working educators, not a burdensome expense. Unionized educators bargained higher wages, and on average, have better health insurance, pensions, and job security than unorganized educators do.
- ✓ NEA doesn't set the dues. Only delegates to the NEA Representative Assembly, who are elected by our local or state Association can vote to increase our dues.
- ✓ Almost 30% of NEA dues are returned to Ohio.

How Your 2022-2023 Dues Dollars Are Allocated

The chart below shows how your NEA dues (\$204.00; \$122.50 ESP) are allocated to support and represent members and affiliates in their efforts to achieve NEA's mission.

No dues dollars are used to support NEA Member Benefits programs.



Increase Educator Voice, Influence, and Professional Authority

\$5.11 (ESP \$3.10)

Develop and sustain effective structures, processes, and leaders to increase educator influence in decision-making at worksite, district, state, and national levels.

Recruit and Engage New and Early Career Educators

\$4.63 (ESP \$2.81)

Identify, recruit, support, and engage new educators in our association, and connect them with opportunities for professional learning, leadership and advocacy.

Advance Racial Justice in Education

\$7.47 (ESP \$4.54)

Support members in advancing racial justice in education and improving conditions for students, families, and communities through awareness, capacity-building, partnership, and individual and collective action.

Support Professional Excellence

\$12.96 (ESP \$7.87)

Build a system of association-convened, educator-led professional learning and supports for all educators across their career continua to ensure student success.

Secure the Environment to Advance the Mission of the NEA and Its Affiliates

\$23.94 (ESP \$14.55)

Use all available means, including organizing, legal, legislative, electoral, and collective action, to secure the environment necessary to protect the rights of students, educators, and the future of public education.

Legal and Insurance Support

\$19.09 (ESP \$11.60)

Implement advocacy programs for members, including the Unified Legal Services Program, Fidelity Bond, Association Professional Liability insurance, and a \$1 million per member Educators Employment Liability insurance program.

Enhance Organizational Capacity

\$70.17 (ESP \$42.63)

Develop and leverage the collective organizational capacity across our association that is necessary to advance the mission of the NEA and its affiliates, with particular focus on organizing, technology, fiscal health, leadership development, and internal and external partnerships.

Enterprise Operations

\$54.95 (ESP \$33.38)

Ongoing functions across the enterprise that support the Strategic Objectives, build lasting strength, and sustain the organizational infrastructure.

Contingency

\$1.68 (ESP \$1.02)

Provide funding for emergencies at the national, state, or local levels.

Answering Tough Questions: *Affirm–Answer–Redirect*

For this exercise, have trainees brainstorm the reasons people don't join the Union and then chart it in small groups. Second, have the groups develop their answers in the format below: "Affirm—Answer—Redirect".

Conversations often don't go exactly the way we had initially planned and that is ok and normal. It is important to keep the focus on your message. When people come to you riled up over the spin from anti-union groups 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.



MODULE 5

Mapping

Basic Mapping: Learning the System

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

Universal Assessment Scale:

- 1: Member Leader/Member Activists (orange)**
- 2: Member (blue)**
- 3: Persuadable Potential Member (green)**
- 4: Oppositional Non-Member (yellow)**
- 5: Influential Oppositional Non-Member (red)**
- 0: Unassessed (white)**

ORANGE	<ul style="list-style-type: none">✓ Member leader✓ Member activist✓ Often has followers
BLUE	<ul style="list-style-type: none">✓ Current members
GREEN	<ul style="list-style-type: none">✓ Persuadable-new hires✓ Have said they'll join, but never do✓ May take several one-to-ones✓ Majority of your potential members are in this group. A true place for engagement.✓ Most of your time will be spent with this group
YELLOW	<ul style="list-style-type: none">✓ Oppositional non-members✓ They are vocal about not being a member and like to engage people in debates about the local✓ It is also important to understand why they are "yellows" to move them towards an eventual "blue" status, or to isolate them.
RED	<ul style="list-style-type: none">✓ Influential oppositional non-members✓ Often have oppositional followers
WHITE	<ul style="list-style-type: none">✓ Unassessed, unable to reach / meet

Mapping on the Roster

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

Local Name	Member ID	Name	Member Type	Grade Level/ Dept.	Estimated Generation	Athletic Coach	What We Know About Them	Organizer/ Contact
Sioux Falls Education Association	1565665	David Brown	Potential Member		Baby Boomer Generation X Generation Y Millennial	YES / NO		
	1226598	Jane Jones	Potential Member		Baby Boomer Generation X Generation Y Millennial	YES / NO		

Advanced Mapping: Connections and Trends

1. You're going to need a map of each work site in your school district. Chart out all worksite employees.
2. On your map, write down each member's name, and highlight their name with the same color you used on your roster. See color code on page 24.
3. Current members should be highlighted with blue, and those members who are strong potential leaders should be circled.
4. Once you have your map and chart highlighted, look for trends:
 - a. *Is one area full of green potential members?*
 - b. *Is one department strong in membership and another low?*
 - c. *Are any of your members people who get to see most of the workforce (i.e. special education teachers, specials teachers, librarians, district maintenance workers)? Think about how to get these members to be leaders. How do we move blues to oranges?*
5. On your roster, look for trends. Mark the columns for "Estimated Generation" and "Athletic Coach."
 - a. *Are all coaches green? Why do you think this is? Have you developed a plan to work on coaches?*
 - b. *Are all baby boomers blue? Are millennials blue? How are you reaching out to millennials?*
6. Next, look at the notes you wrote down. Do you see any trends there?
 - a. *Are all your potential members who live out of the district green?*
 - b. *Are potential members who are green close with a certain current member? Is that member asking them to join or just giving them the information without asking them to be a member?*
7. The next step to advanced mapping can be charting potential members and current members based on their schedules.

MAPPING REMINDERS:

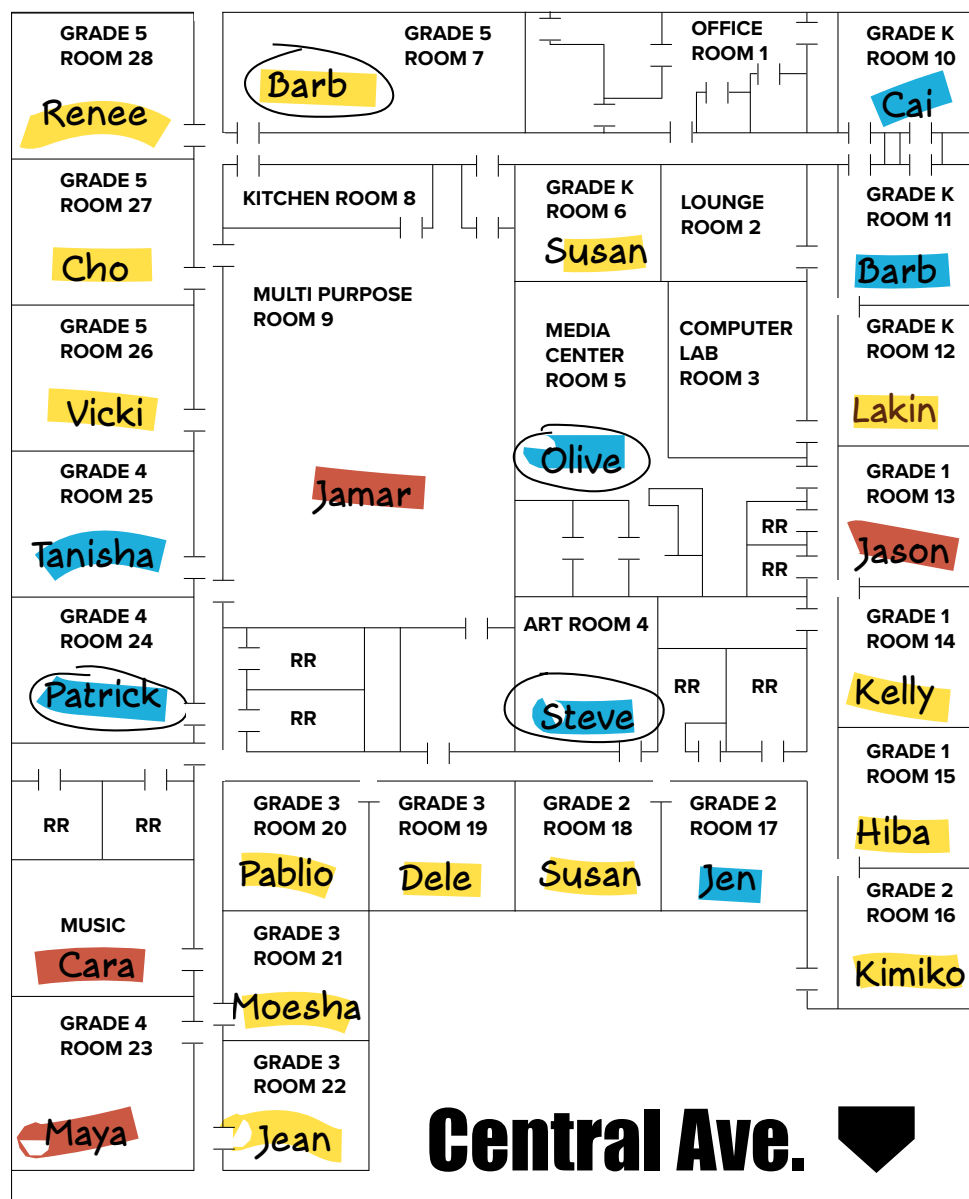
- Mapping rosters, maps, and charts should not be shared outside of those actively building the plan for membership (officers, LRCs, OEA staff, membership chair, Association Representative/ Worksite Representative).
- Mapping is only useful if it is accurate. Set aside 10-15 minutes at each Association Representative/Worksite Representative meeting to check mapping data and update as needed. Talk about challenges and see if there are connections elsewhere that can assist.



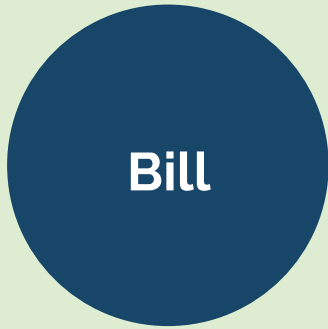
POINT OF INFLUENCE: Mapping Those Who Have Influence Over Others

There are people who influence others, leading them in both positive and negative ways. It's important when mapping to know who is influential and how they feel about the Association.

A power map can be used to examine the influences of leaders in each work site. For example, positive leaders for the Association are circled or colored orange, negative leaders who do not support the Association are underlined or colored red.



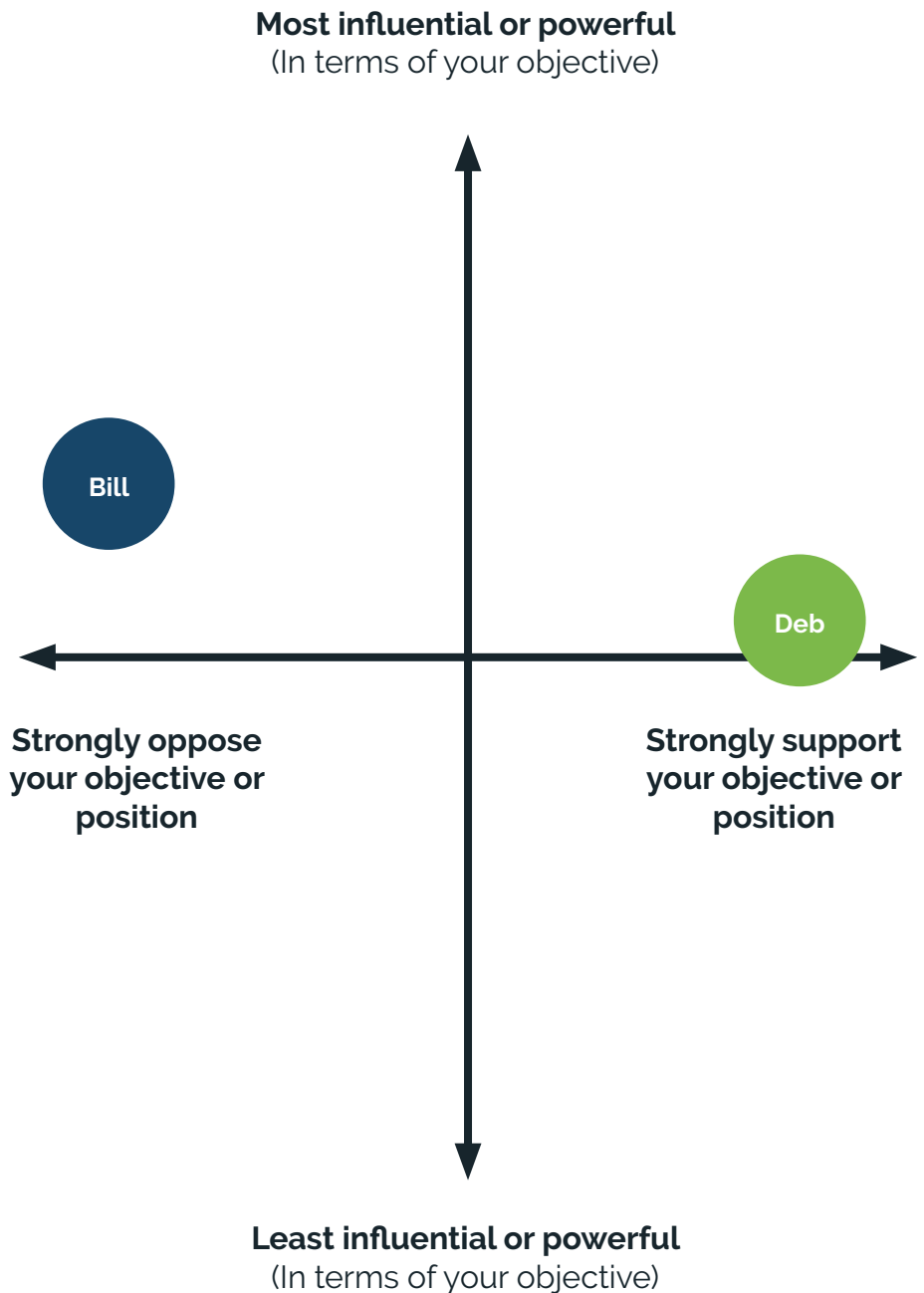
Considerations and Preparations:



Bill was the president of the local Association 15 years ago, but lost his election to Deb. He decided he would do whatever he could to destroy the current leadership. The election was very close, so Bill has a lot of supporters.



Deb was a past president who was well-loved, but had decided to retire from the position. She trained the current president and is still seen as a sage advisor in the district.



Suggested Planning and Logistics for Work Site Visits

Suggested Planning and Logistics for Work Site Visits:

- Work with the Local President.
- Work with the Worksite Representative to schedule the visit. Find out the best days and times.
- Find out which locations in the building have the most “traffic”.
- Send flyers in advance announcing the date, time, and purpose of the visit.
- Be clear on your purpose for the visit.
- Before your visit, talk with the Worksite Representative about the history of the Association at the particular site and about the culture at the site.
- Review the site’s membership list and compare it to the list of employees at the site. Target which members and potential members to be sure to visit.
- Bring visibility items or incentives to leave at the site. Be sure to bring enough. Work with the Worksite Representative to bring something of value to the members and potential members.
- Bring refreshments.
- Bring a few select materials that demonstrate the value of the Union.
- Bring business cards and wear your local or OEA name badge.

Suggested Strategies to Use at the Work Site:

- Always check in with the school office.
- Introduce yourself to or greet the building administrator and the administrative assistants.
- Meet the Worksite Representative at the building and work with the Worksite Representative to set up the visit: materials, visibility items, food, Union identification.
- Just walk up to people and say, “Hi.” Don’t wait for them to come to you.
- Talk to everyone. Talk to people one-to-one as much as possible.
- Ask open-ended questions and listen.
- Be clear on the purpose of your visit.
- Look for and establish a reason to come back to the building/work site.
- Listen for member issues and concerns.

Suggested Follow-up Activities:

- Write up any notes from the visit and share them with the Worksite Representative and Local President.
- Send a thank-you note to the Worksite Representative, a note that can be posted on the Association bulletin board.
- Respond to questions as quickly as possible.
- Send information of interest to your “targets” at the site.
- Publicize the fact that you were there.
- Look for a reason to go back.

New Educator Recruitment and Retention

What is the New Ed Campaign?

The New Educator Engagement, Recruitment, and Supports Campaign “New Ed” is a critical part of the OEA’s year-round membership strategy.

In a world of changing Union membership, OEA and our locals can continue to build power by scaling up new member recruitment. Through intentional engagement with the next generation of new educators and Association Leaders, we aim to further a culture of relational organizing, destroy the myth that our Union’s best days lay in the past, and build lifelong loyalty through face-to-face contact, direct digital communications, and professional supports.

Engaging New Educators at the Work Site:

1. **New Educator Orientations:** Gaining access and maximizing recruitment at New Employee Orientations (NEOs) through one-to-one conversations.
2. **Data-Digital Engagement:** Collecting data on organizing conversations to build a customized email campaign which increases member retention by 2% on average. The key is to collect **New Educator Campaign Interest Forms** on all new to the profession educators. This form can also be used for all members. Copies of the forms can be requested at organizing@ohea.org, downloaded at <http://www.ohea.org/supports> or an online version can be found at <https://www.ohea.org/ohios-new-educators>.
3. **Work Site Membership Engagement:** Ensuring Worksite Representatives engage and recruit all potential members within the first year. A key component is to collect contact information and other data on all potential members at each work site.
4. **Data-Driven Decision Making:** Customizing your local’s work by addressing the needs of new and newly hired educators based upon the results of the new educator conversations and data collected on the **New Educator Campaign Interest Forms**.

Building and Maintaining Connections:

1. Work with your OEA Labor Relations Consultant to commit your local to the New Ed campaign.
2. Lead from the top with support. Locals with supportive presidents are more likely to have higher levels of one-to-one conversations and recruitment levels.
3. Talk to new educators at New Employee Orientations (NEOs) and at your local’s new educator event. Make sure you are covering these NEOs and that your Worksite Representatives are trained in making the invitation to membership.
4. Connect new educators with the Ohio’s New Educators (ONE). <http://www.ohea.org/one>.
5. Contact OEA at organizing@ohea.org for additional assistance.

New Educator Campaign Interest Form Talking Points

(Sample NEO Presentation Script)

The (Local) is excited to be here to meet each of you as you begin your journey as an educator in our School District!

(Describe your local (who you are, who you represent, recent victories, etc.) to NEO attendees. Using the results of the B.R.A.G. Sheet can be helpful.)

Today we want to learn about your interests and concerns — and most importantly how we can best support you as an educator — whether you are new to the profession or new to our district.

It's important for us to communicate to all of you the following:

1. **You are never on your own.** As a member, you have access to high-quality professional development and education experts to help when you need it most.
2. **Your voice will be heard.** Through (name of local), educators offer expertise and knowledge when policy decisions are made. Together, our voices give us power.
3. **You can grow in your profession.** You can access people and resources and make connections at your school, in your state, and throughout the nation among OEA's 120,000 plus members.
4. **You have friends in powerful places.** When it comes to bargaining, negotiating, and advocating for our students, we have a seat at the table, and we support each other.
5. **As a member you are part of the OEA family that works to give students the education they deserve.** When you join our local and the OEA you are part of a family filled with some of the brightest, most dedicated, passionate, energetic, and optimistic people you will ever meet.

We have staff and member leaders (have these individuals raise their hands) present today to speak to each of you. Your interests, your concerns, your needs — that's what we're here today to discuss, and to identify where we can respond to these issues.

You'll see that the interest form asks about your professional interests including classroom conditions, social justice, parental and community engagement, and education policy — there's also space for you to add other interests, in case we missed some things.

We also want you to know what support tools you'd like us to provide – whether it's student debt workshops, professional development trainings, or opportunities to tackle social and economic justice issues in our classrooms and communities. Filling out this interest form allows us to best support you!

We are stronger together — when we work together to support one another and our students. We look forward to speaking with each of you today, listening to each of you today, and learning from each of you today about what you need and want, and what motivated you to enter the education profession.

Thank you!

Simplified Back-to-School Process and Checklist

It is vital that we deepen partnerships for successful Back-to-School campaigns so that we recruit, engage, and support new educators as they make the decision to belong to and become part of the FUTURE of our Union. The first impression of your Union is a lasting impression.

Preparation for Back-to-School

- ☐ Membership materials have been prepared and a distribution plan is in place
- ☐ Request a list of new hires from the district **before** the start of the school year
- ☐ Determine and list all members and potential members at each work site
- ☐ Plan the strategy and tactics for **New Employee Orientation (NEO)**
- ☐ Order membership organizing materials from OEA (**Membership Training Guide, New Teacher Guide, New ESP Guide, Worksite Leader Guide**, flyers, promotional materials, etc.). Materials can be ordered at <https://www.ohea.org/supports>.
- ☐ Review OEA's ideas for 12-month membership engagement. Request **OEA's Membership Engagement Calendar** at <https://www.ohea.org/supports>.

Starting Strong During Back-to-School

- ☐ Secure a speaking spot at the **New Employee Orientation** (many new hires will not understand who you are). Make a concerted effort to design "an invitation to membership" and INVITE new hires to BELONG to their career/field/job category/profession:
 - *Have a current member do a testimonial (story of self).*
 - *Have 1-to-5 ratio of new hires to member leaders in the orientation room picking up membership forms from new hires.*
 - *Make belonging fun with a raffle and/or activity.*

Train Worksite Representatives

- ☐ Schedule a before school Worksite Representative training on one-to-one conversations, asking and answering tough membership questions, and have Worksite Representatives map their building (see Module 5: Mapping on page 24) to better track membership invitations.
- ☐ First week of school — Send a welcome letter from the local Association (See sample letter for new employees on page 35).
- ☐ New hire contacts have been delegated to individuals in each work site. Consider implementing a **"First Friend, Best Friend"** Union buddy system:
 - *Worksite Representatives map the building. Determine who is best positioned to be the Union buddy for the new hire (request OEA's **"First Friend, Best Friend"** flyer for suggestions).*
 - *Prep the one-to-one conversation process (page 36 - Sample Back-to-School Conversation frame).*
 - *Distribute other helpful local information for new hires (top contract provisions, work site specific information, Worksite Representative contact information, administrative contacts, etc.).*

Building Loyalty

- Check in on the relationship building:
 - *President/designee calls Worksite Representative to see how contacts are going;*
 - *Troubleshoot any concerns;*
 - *President/designee visits work sites where there are no representatives to help with making contacts or determining a Union buddy for the new hire;*
 - *President/designee designs a Union orientation for new hires;*
 - *Follow-through on the initial invitation to membership from orientation.*
- Get all new member hires registered for an upcoming event (i.e., Fall Conference, an Ohio's New Educators (ONE) event, local development training, etc.).
- Get all new hires to fill out the **New Educator Campaign Interest Form**. An online version of the form can be found at <https://www.ohea.org/ohios-new-educators>.
- One month in, request a refreshed list of new hires to be sure you get any the district missed.
- Check in on new hires monthly (both members and potential members):
 - *Make sure all hires have safety information and a copy of the contract;*
 - *What can you do for related arts teachers? Counselors, Nurses, Speech/Language, Techs, etc. (Coordinate help from neighboring districts for newbies?).*
- Hand-deliver a copy of the first newsletter from your local or district to new hires.

Success at Back-to-School time means that every educator starts the year off with a powerful sense that their Union is their best resource for ensuring their professional success, throughout the year and through their entire career.

This should be demonstrated not just by what members **GET**, but what members can **BECOME**, **ACHIEVE**, and **IMPACT** through Union membership.



Sample Letter

Note: Significant editing must be done to make this letter personalized for your local. REMOVE heading and anything in brackets. Type a letter on your official Association letterhead. Hand write notes on your own cards. Make sure spelling and grammar are perfect.



Dear (person's first name):

On behalf of the members of the **[Local Education Association name]**, I want to welcome you to the education profession and the school system!

[Local Education Association name] is an affiliate of the Ohio Education Association (OEA) and the National Education Association (NEA). We are unified organizations, as the names might imply. More importantly, however, we are a unified, professional family working to enhance our great schools for students and the people who work in public schools. Our members' working conditions are our students' learning conditions.

We are very proud of the accomplishments we have made over the years, and there is much yet to be done. We look forward to your active involvement in your Union throughout your career in education. But first, we want to help you get started here in **[name of city/community]** schools with some important information and with our full support for a successful first year.

[insert info on your new employee function, or other important local information]

Please give me a call at **[your phone number]** or call **[person in charge of new employee function]** at **[phone number]** to let us know if you will be able to join us. If you cannot be there, we will try to make other arrangements to meet you and share our very popular **[resource such as New Teacher Handbook, Guide, etc.]** and other Association materials.

Welcome again to your professional family. I look forward to seeing you on **[day of the event]!**

Sincerely,

[Sign your first name —type your full name, Association title, assignment, and email address]

Joey Bosa
First Vice-President for Membership, Anytown Education Association
English—Haller Middle School (West Wing)
JBOSA_HallerMiddle@gmail.com

NOTES

[illegible]

NOTES

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



OHIO EDUCATION ASSOCIATION

225 E. Broad St., Box 2550, Columbus, OH 43216
614-228-4526 | 800-282-1500 | 844-632-4636

www.ohea.org



FACEBOOK
facebook.com/OhioEA



INSTAGRAM
instagram.com/OhioEA



TWITTER
twitter.com/OhioEA



YOUTUBE
youtube.com/user/OhioEdAssoc



PINTEREST
pinterest.com/OhioEA