

# NEA's Guide to a Successful Member Organizer Program

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

### Our Leadership:

Rebecca Pringle, NEA President  
 Princess R. Moss, NEA Vice President  
 Noel Candelaria, NEA Secretary-Treasurer  
 Kim A. Anderson, NEA Executive Director

### NEA Executive Committee:

Mark Jewell, North Carolina  
 Gladys Fátima Marguez, Illinois  
 Ron "Duff" Martin, Wisconsin  
 Robert Rodriguez, California  
 Christine Sampson-Clark, New Jersey  
 Hanna Vaandering, Oregon

## INTRODUCTION:

# Why Member Organizers?

As with everything we do when it comes to membership recruitment and engagement, **the people are the key**. This guide will help you and your team identify the right people, plan the appropriate training for them, and support them with follow-up and accountability. This process will help us reach our goal of building the Association/Union and expand our power as we grow. NEA's year-round organizing plans include incorporating one-on-one organizing conversations and utilizing actual members to have the conversations. When we systematize that tactic, we are using Member Organizers.

### Member Organizers:

- ▶ **Expand the capacity** of leaders and staff to recruit and engage members in the work of the Association/Union. Leaders and staff can't be everywhere. More people doing the work means more work is getting done.
- ▶ **Increase opportunities for existing Association/Union members** to engage with other members and potential members. Expanding the leadership and engagement potential of individual members builds overall power for the Association/Union.
- ▶ **Help an affiliate or local build power** by engaging members and potential members in conversations about membership, political action, bargaining priorities, and professional needs. These relationships translate into ready networks of members who can help move their circle of influence to action for issues that further Association/Union priorities.



Sandy Rohn, ESP, Florida



### What is a Member Organizer?

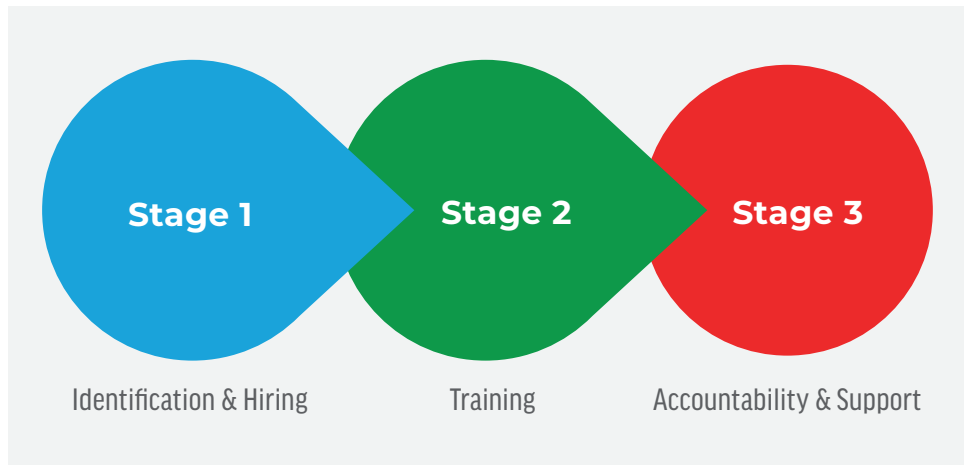
Definition: **Member Organizers** use targeted data to expand the capacity of the local/affiliate to recruit new members and to engage potential members by having one-on-one conversations, but also through other strategic organizing tactics identified by the local or affiliate. Member Organizers are typically paid for their time and travel, as this work typically occurs outside of the regular workday and at various locations.



### What is a Building Rep/Association Rep?

Definition: **Building Reps/Association Reps** are the voice of and conduit between the Association/Union and the members at the worksites. They engage and/or recruit members and potential members at their worksites on behalf of the local Association/Union.

## Overview of Planning



### STAGE 1:

## Identification & Hiring

### IDENTIFY Your Member Organizers

- ▶ **Have a process** designed for the identification of MOs with inclusiveness of all aspects of Association/Union members in mind—from racial diversity to variety in years of experience, from early career educators to more experienced, and both teachers and Education Support Professionals.
- ▶ **Utilize data** from a variety of sources, including NEA 360 and VAN, to identify potential activists along with information from site visits and leader identification assessments on current and potential members to build your applicant pool.
- ▶ **Communicate the process** for hiring or joining the team to the potential pool of MOs.

### Stage 1 Best Practices

#### Member Organizer Program Best Practices Checklist

- ☐ **IDENTIFY** Your Member Organizers
- ☐ Have **CLEAR EXPECTATIONS** for Member Organizers
- ☐ Prepare a Member Organizer **ORIENTATION/ONBOARDING**

### The keys to a successful Member Organizer Program are:

- ▶ **Objective 1:** Planning ahead for thoughtful identification and hiring of Member Organizers.
- ▶ **Objective 2:** Clear expectations.
- ▶ **Objective 3:** Strong skills training and practice.
- ▶ **Objective 4:** An accountability process for following up.



**PRO TIP:** Train a big enough pool of candidates so you have alternates to fill open spots if you lose some during the year. Ask successful Member Organizers for recommendations of others who might be interested in this work.

## STAGE 1:

# Identification & Hiring *(Continued)*

### Have **CLEAR EXPECTATIONS** for Member Organizers

- ▶ **Have clear written expectations** for MOs and include schedules (*for training, debriefs, check-ins, etc.*), data collection requirements, conduct, dress, confidentiality, and sharing of information.
- ▶ **Set specific goals for MOs**, such as number of contacts or New Ed cards per week, number of recruits, number of work hours per week expected, etc.

### Prepare a Member Organizer **ORIENTATION/ONBOARDING**

- ▶ **Create a contract and handbook** for Member Organizers with all the materials needed for record-keeping, payroll, training guides, etc. Include enough time in your training plan to go over these items.
- ▶ **Encourage success** and be enthusiastic about their potential for success.
- ▶ **Designate start and end dates** for the Member Organizer Program.

Not every Association rep/building rep is cut out to be a Member Organizer. Consider other individuals who might have shown interest but are not currently in a leadership role.

#### For examples of priorities and expectations, see:

Appendix A: Ohio Member Ambassador Priorities; and  
Appendix B: Alabama Independent Contractor Agreement and Member Organizer Voucher Form.



#### **PRO TIP:** Engaging Early Career Educators (ECEs) as Member Organizers has a dual purpose:

1. ECEs directly engage with their Association/Union to build power.
2. ECE potential member recruits see themselves in the Member Organizers and are more likely to join when asked.

## STAGE 2:

# Skills Training & Practice

## Develop a Training Plan

Maximize your Member Organizer Program's potential for success by being deliberate in your training, offering opportunities for real-life practice, and being prepared to retrain and/or follow up once the work actually begins.

Address issues that come up in training. If you see reluctance or weaknesses during the training and practice, it will likely not improve over time when they are in the field without intervention. MO work is not for everyone.

If you want your MOs to utilize and collect data through a particular technology (*like VAN or NEA360*), be sure to incorporate that into the training plan. Spend the time that data collection deserves, because without good data there can't be follow-up. Without follow-up, there won't be positive outcomes for engagement in the future.

## Stage 2 Best Practices

### Member Organizer Program Best Practices Checklist

- ☐ Schedule a reasonable length with time to practice and not feel rushed.
- ☐ Model what you want Member Organizers to do before, during, and after contact with potential members.
- ☐ Train MOs to use the technology reporting tools.
- ☐ Spend time on administrative items such as timesheets, logs, etc.

### For examples of organizer training agendas and calendars, see:

Appendix C: Nebraska Agenda for Member Organizer Training; and

Appendix D: Nebraska Overview of Winter Organizing Calendar.



**PRO TIP:** Demonstrate and have MOs practice everything they are expected to do. Leave nothing to chance.



### STAGE 3:

## Support, Monitoring, & Accountability

### Keeping Track Through Monitoring and Support

Once your Member Organizers are chosen and trained, the important work of follow-up begins.

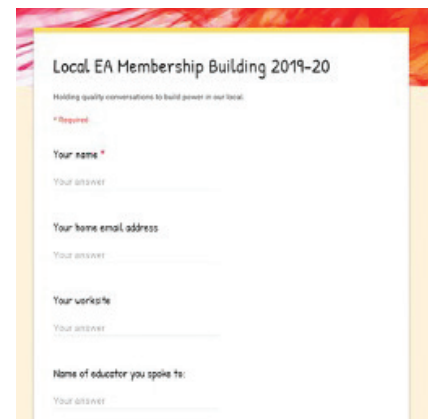
When you planned your program, you chose goals for the overall program (e.g., number of New Ed cards to collect, number of one-on-one conversations with New Employees, percentage of new members recruited, etc.). These goals should translate into individual goals for your Member Organizers to work toward, and for the program leads to monitor.

Consider creating a Lead Member Organizer position to help coordinate paperwork, data and data technology support, coaching, etc.

### Stage 3 Best Practices

#### Member Organizer Program Best Practices Checklist

- ☐ **Set program goals and communicate them** to all, with incremental progress checkpoints (e.g., recruit 10 members a week versus recruit 100 members for a campaign).
- ☐ **Schedule check-ins and data reviews in person and virtually.** Maintaining regular contact and relationships with your Member Organizers keeps them motivated and on track.
- ☐ **Establish a calendar with timelines** for check-ins, data collection, and reports.
- ☐ **Have a plan to use the data collected** for follow-ups and further engagement beyond membership recruitment.
- ☐ **Celebrate progress with the team**, individually and collectively. This is not easy work.



The image shows a sample of a survey form titled "Local EA Membership Building 2019-20". Below the title is a subtitle "Holding quality conversations to build power in our local." and a red asterisk indicating required fields. The form has five sections, each with a label and a text input field: "Your name", "Your answer", "Your home email address", "Your answer", "Your workplace", "Your answer", and "Name of educator you spoke to:", "Your answer".

*Sample from Arizona – Member Organizer Webinar Resources "Arizona: Member Organizer Data Collection Google Doc Survey"*



**PRO TIP:** Schedule your check-ins and follow-up meetings ahead of time, before they actually begin working. Treat the scheduled check-ins as an imperative part of the workday for Member Organizers.





# Member Organizers in Northwest Arctic, Alaska

Heading into a bargaining year, the Northwest Arctic Education Association and the Northwest Arctic Education Support Professional Association of the Northwest Arctic Borough School District (*District offices located in Kotzebue, Alaska*) used a Member Organizing Program to engage their current members and recruit new members. In most other places, this plan would present some challenges, but for the leaders in the Northwest Arctic, Sam Dutton and Mandy Hill, the challenges were opportunities.



*Village worksite*



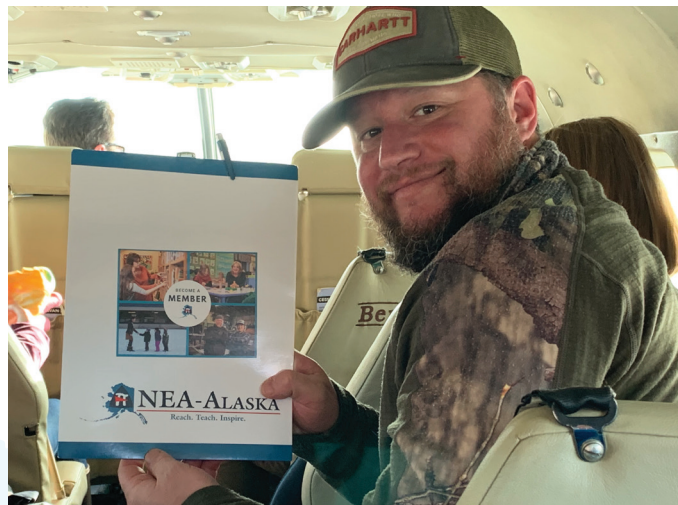
*Alaska bush plane waiting for MOs*

## What They Did:

Over four days in September 2019, members were trained and then conducted organizing conversations around key issues like overcrowding, staff turnover, and housing for educators in the remote villages. Member Organizers flew in and out the same day on bush planes, and while the number of potential members in each of the villages was relatively small, in many cases they were able to recruit everyone who was eligible to join.

## The Results:

Each village is unique, with cultural differences and challenges that make them as distinct as a separate school district. By expanding the locals' capacity and using Member Organizers, both locals accomplished in one week what would have been nearly impossible for a lone staff member or leader to do in the same amount of time. Both locals increased their membership, grew in strength, and actively engaged their members while putting faces and names to the Association they belong to. Member organizing works!



*New Member recruit on bush plane (this member signed while on the plane after talking to a Member Organizer).*

## ADDENDUM

# NEA's Guide to a Successful Member Organizer Program

### NEXT STEPS:

## Leveling Up Your Member Organizer Program

Member Organizers expand local and affiliate capacity to recruit and engage members and potential members, and were essential to pandemic and pandemic recovery member engagement and recruitment. This guide aims to share best practices to sustain Member Organizers once hired and trained. After your Member Organizers are recruited, employed, and trained, the critical work of follow-up and retention begins. We know that Member Organizers who work over multiple campaigns experience more success than those who are newly trained, so the efforts to retain experienced Member Organizers must be planned, intentional, and ongoing.

In general, the most successful Member Organizer programs **build and nurture relationships** through **strong communication** with program staff and leads as well as other Member Organizers. A by-product of those strong relationships is a **sense of community, camaraderie, and collaboration** that helps Member Organizers succeed in their immediate work and see a pathway to deeper engagement and leadership in their union.



**Build and Nurture Relationships** through regular communication (both in person and virtually) from program staff or lead Member Organizers.

- ▶ **Weekly Team Meetings:** Local teams should meet regularly (weekly or bi-weekly) with program staff or Member Organizer leads to go over results from the prior week, discuss their game plan for the upcoming week, and troubleshoot any issues. Here is a [sample agenda](#). These meetings should be agenda-driven and last no more than 45 minutes to one hour.
- ▶ **Regular Workshops:** Offer a training series that focuses on topics to enhance organizers' skills and knowledge. Take a look at a sample [training series agenda](#).
- ▶ **Virtual Office Hours:** Create opportunities for Member Organizers to informally interact with leads and staff to ask questions, get assistance, or share information. A consistent one-hour pop-in time works well.



**Celebrate and Report on Success** by collecting information and sharing with all the Member Organizers.

- ▶ **Reporting Forms:** In addition to the raw data for the number of 1:1 conversations, members recruited, events held, etc. that you may be tracking, ask organizers to complete a weekly reporting form of anecdotal information about their work that week. It will help staff and leads monitor the work on the ground and have information to share and celebrate or issues to address. Here is the [weekly reporting form](#) that was used for Nebraska's Education Summer program.
- ▶ **Highlight Updates:** Consider creating a consistent format to share updates using tools such as Publisher, Canva, etc. Use these updates to communicate with Member Organizers and highlight organizers' work, report the latest results, and provide learning opportunities. This is a great way to acknowledge the organizers' work and encourage them, too. Here are some examples of [newsletters](#) from the Nebraska Education Summer Program.

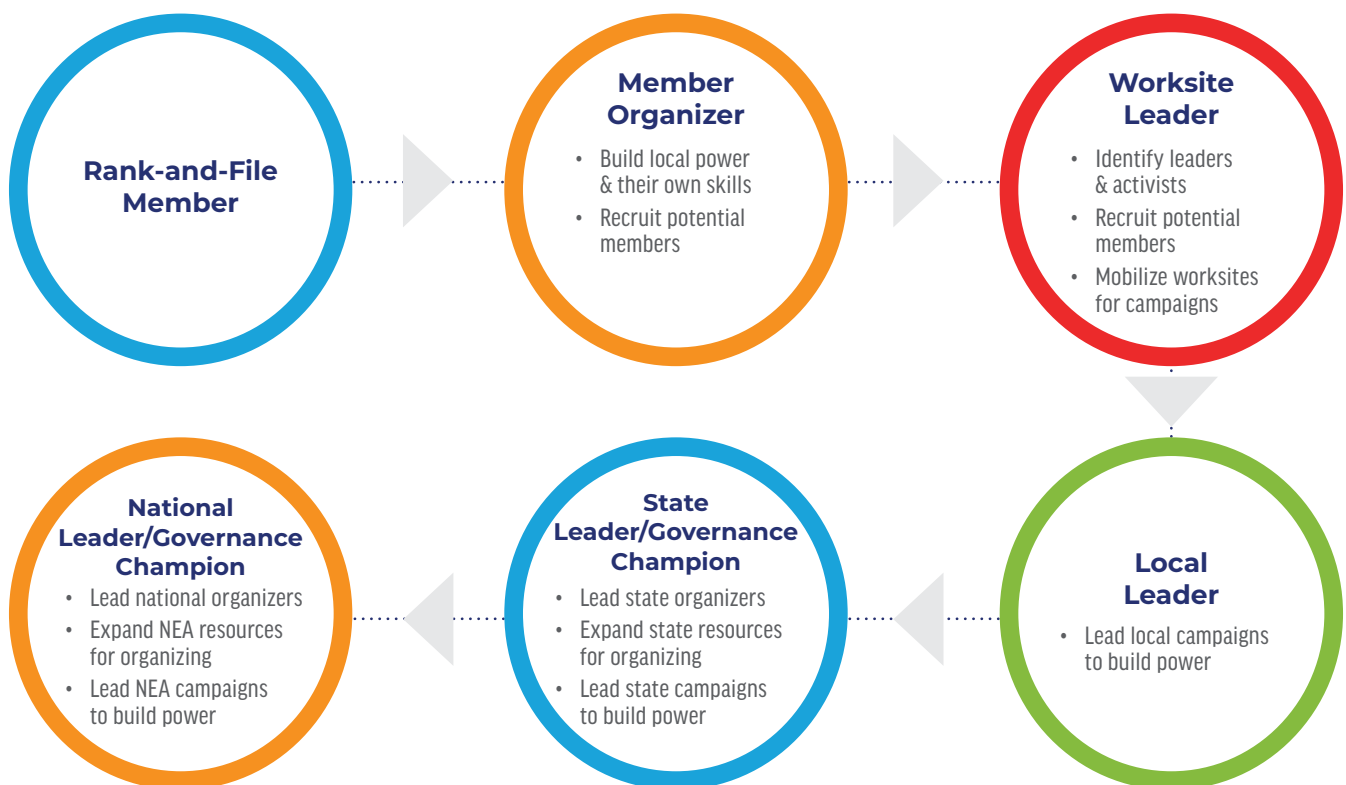
**Foster Member Organizer Community Interaction** for camaraderie and collaboration.

- ▶ **Private Facebook Group:** Creating a private Facebook group for Member Organizers creates community among the organizers. They can use the page for sharing success stories and photos from events or encouraging each other. It's also a great place for staff and leads to share tools, flyers, new information, or hot takes from their work the previous week.

**Provide a Pathway for Deeper Engagement** in the union as a future committee chair, elected leader, worksite representative, or even a local, state affiliate, or national staff person.

## BUILDING 21<sup>ST</sup> CENTURY UNIONISM

# Organizing Leadership Development Pathway



The pathway to leadership for Member Organizers begins when prospective Member Organizers are identified and begin their training, building local power and their own skills through membership recruitment. Member Organizers can continue on the pathway to build their skills and increase their engagement in union work by becoming a Worksite Leader or Local Leader and perhaps even a State or National Leader.

## Member Organizing Pathway to Leadership



**Jennifer Kinkade**, a speech-language pathologist in St. Lucie County, FL, was engaged with her future union even before she could officially be a member! She began her union work collecting signature cards from her fellow speech-language pathologists to help the Education Association of St. Lucie certify a third bargaining unit of professional-technical employees not represented by any other union. That new unit, Pro-Tech, became a part of the Education Association of St. Lucie (EASL) in 2018. The union president tasked Jennifer to work as a Member Organizer in 2019 to help build the Pro-Tech membership. After a year of work as a Member Organizer, membership grew, and Jennifer was recently elected to represent her unit on the EASL Executive Board. In November 2021, the EASL Pro-Tech unit, with Jennifer and her colleagues, ratified their very first union contract.



## APPENDIX A:

# Ohio Member Ambassador Priorities

### Member Ambassador Priorities

1. Fully execute the New Educator (New Ed) Campaign on behalf of Ohio's New Educators (ONE) and the Ohio Education Association (OEA);
2. Develop an Early Career Educator (ECE) group in the local Union;
3. Cultivate a relationship with District Leadership (i.e., NEOEA, ECOEA, NWOEA, NCOEA, etc) and attend district events on a regular basis. Organize at least two socials (one in the Fall and one in the Spring) in the district for ECEs;
4. Develop a relationship with the local Union Labor Relations Consultant (LRC) and keep them informed of ECE events in their area;
5. Work with the local Leadership Council and attend meetings on a regular basis and keep them informed of the New Ed campaign progress and other ECE events/opportunities;
6. Invite new educators into membership with OEA;
7. Have new educators in assigned turf fill out New Ed interest form and enter data into the online location ([tinyurl.com/oceanewed](http://tinyurl.com/oceanewed));
8. Like the ONE Facebook, Instagram and Twitter pages (OHneweducators);
9. Subscribe to the ONE e-mail newsletter and GroupMe account;
10. Have regular support/engagement conversations with new educators **and** record in MiniVAN;
11. Drive new educators to events (i.e., socials, leadership, professional development, district engagement, etc.)
12. Identify at least four (4) new natural leaders and drive them to leadership opportunities;
13. Recruit and engage aspiring educators. Invite all student teachers in the local Union into membership with the Ohio Student Education Association (OSEA);
14. Maintain good lists and keep good records.

# Alabama Independent Contractor Agreement and Member Organizer Voucher Form

**July 15 to September 30, 2019, Recruitment Period**

1. **Independent Contractor.** Subject to the terms and conditions of this Agreement, the AEA hereby engages the Contractor as an independent contractor to perform the services set forth herein, and the Contractor hereby accepts such engagement.

2. **Duties, Terms, and Compensation.** The Contractor's duties, term of engagement, compensation and provisions for payment thereof shall be as set forth in the document which is attached as Exhibit A, which may be amended in writing from time to time, or supplemented with subsequent estimates for services to be rendered by the Contractor and agreed to by the AEA, and which collectively are hereby incorporated by reference.

3. **Written Reports.** The AEA may request that project plans and progress reports be provided by the Contractor on a weekly basis. A final results report shall be due at the conclusion of the project and shall be submitted to the AEA in a confidential written report at such time. The results report shall be in such form and setting forth such information and data as is reasonably requested by the AEA.

4. **Confidentiality.** The Contractor acknowledges that during the engagement they will have access to and become acquainted with various information, records and specifications owned by the AEA and/or used by the AEA in connection with the operation of its business including, without limitation, the AEA's business methods, and member lists. The Contractor agrees that they will not disclose any of the aforesaid, directly or indirectly, or use any of them in any manner, either during the term of this Agreement or at any time thereafter. All files, records, documents, information, letters, notes, media lists, notebooks, and similar items relating to the performance of the contract, and all copies of the same, shall be the property of the AEA and shall remain the exclusive property of the AEA. The Contractor shall not retain any copies of the foregoing without the AEA's prior written permission. Upon the expiration or earlier termination of this Agreement, or whenever requested by the AEA, the Contractor shall immediately deliver to the AEA all such files, records, documents, information, and other items in their possession or under their control. The Contractor further agrees that they will not disclose their retention as an independent contractor or the terms of this Agreement to any person other than the AEA prior written permission. The Contractor shall at all times preserve the confidential nature of their relationship to the AEA of the services rendered.

5. **Conflicts of Interest; Non-hire Provision.** The Contractor represents that they are free to enter into this Agreement. During the term of this Agreement, the Contractor shall work no more than 20 days without prior approval from the Assistant Executive Director for Field Services. The Contractor is expressly free to perform services for other parties while performing services for the AEA.

6. **Independent Contractor.** This Agreement shall not render the Contractor an employee, partner, agent of, or joint venturer with the AEA for any purpose. The Contractor is and will remain an independent contractor in their relationship to AEA. The AEA shall not be responsible for withholding taxes with respect to the Contractor's compensation hereunder. The Contractor shall have no claim against the AEA hereunder or otherwise for vacation pay, sick leave, retirement benefits, social security, worker's compensation, health or disability benefits, unemployment insurance benefits, or employee benefits of any kind. The Contractor will provide, at their own expense, all equipment, tools and supplies necessary to carry out the obligations required by this Agreement, subject to paragraph 3 above.

7. **Insurance.** The Contractor will carry liability insurance on their vehicle and workman's compensation insurance if required by Alabama law relative to any service they perform for the AEA.

8. **Waiver.** Waiver by one party hereto of breach of any provision of this Agreement by the other shall not operate or be construed as a continuing waiver.

9. **Assignment.** The Contractor is engaged as a professional organizer based upon their professional skills and shall not assign any of their rights under this Agreement or delegate the performance of any of their duties hereunder, without the prior written consent of the AEA.

10. **Modification or Amendment.** No amendment, change or modification of this Agreement shall be valid unless in writing signed by the parties hereto.

11. **Entire Understanding.** This document and any exhibit attached constitutes the entire understanding and agreement of the parties, and any and all prior agreements, understandings, and representations are hereby terminated and canceled in their entirety and are of no further force and effect.

IN WITNESS WHEREOF the undersigned have executed this Agreement as of the day and year first written above. The parties hereto agree that facsimile signatures shall be as effective as if originals.

**THE AEA:**

**THE CONTRACTOR:**

Darryl R. Sinkfield  
Assistant Executive Director for Field Services

Professional Organizer

Date \_\_\_\_\_

Date \_\_\_\_\_

UD#

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Alabama Education Association

## PROFESSIONAL ORGANIZER VOUCHER

Name: \_\_\_\_\_ Month: \_\_\_\_\_ Year: \_\_\_\_\_

[illegible]

## APPENDIX C:

# Nebraska Agenda for Member Organizer Training



## APPENDIX D:

# Nebraska Overview of Winter Organizing Calendar

### Winter Organizing Calendar

Purpose: To Receive Time Sheets; Provide New Time Sheets; Gain Signatures and Documentation; Provide Further Information

January 24<sup>th</sup> – Main Training for Half Price Dues

- Requirements/Reporting Forms/Calendar and Due Dates/Potential Lists

January 31<sup>st</sup> – Chili's at Oakview (4:30 to 6:00)

- **Theme: Story of Self 2.0 – Wrap**
- Turn in Member Forms/Time Sheets – Get New Member Forms/Time Sheets

February 7<sup>th</sup> – Chili's at Oakview (4:30 to 6:00)

- **Theme: How to Log Information**
- Turn in Member Forms/Time Sheets – Get New Member Forms/Time Sheets/Potential Lists

February 14<sup>th</sup> – Chili's at Oakview (4:30 to 6:00)

- **Theme: 10-Minute Meetings**
- Turn in Member Forms/Time Sheets – Get New Member Forms/Time Sheets

February 21<sup>st</sup> – Chili's at Oakview (4:30 to 6:00)

- **Theme: Revisiting the 1:1 Conversation (Difficult Questions/Challenging Conversations)**
- Turn in Member Forms/Time Sheets – Get New Member Forms/Time Sheets

February 28<sup>th</sup> – Chili's at Oakview (4:30 to 6:00)

- **Theme: Preparing for Early Enrollment**
- Turn in Member Forms/Time Sheets



Additional Resources Available  
(email [yro@nea.org](mailto:yro@nea.org) for design files to print).