

Prepared by the NEA Centers for Organizing, Advocacy, Communications, and the Office of General Counsel

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Background

The NEA Center for Organizing Local Growth Team has developed the following guidance with the Center for Advocacy, the Center for Communications, Enterprise Data & Information Systems, and the Office of General Counsel to protect our state and local affiliates' ability to organize during a time of social distancing. Ultimately, we want to provide support for our affiliates' ability to continue organizing members during the pandemic, including access to any alternative forms of new employee orientations and union access to our potential members at worksites.

For additional consultation and resources from the Center for Organizing, contact Matt Bennet, C40 Field Manager at mbennet@nea.org.

We're Going Virtual.

How do we...

- Translate our existing program online?
- Create applications for virtual tools that can be used to augment in-person organizing beyond the COVID-19 crisis?
- Create organizing assignments for MOs that allow for creative usage of virtual tools to pool their talent and creativity, and enhance buy-in and ownership of the adapted program?

1. Keys to Digital Organizing Success

- Organizing in an online model requires the extra step of connecting workers to one another earlier in the process. This is essential to re-create the worksite connection workers are currently lacking.
- Organizers should meet frequently and routinely. Additionally, these meetings must be short and purposeful interactions. Clear tasks, deadlines, and accountability metrics are crucial.
- Structure and responsibilities will be reinforced throughout the campaign. Each worker has an assigned organizer.
- Workers must work through tactics associated with a traditional escalating campaign plan, regardless of whether it's digital or in-person.
- Training on tools and frequent check-ins are paramount.
- A/B testing of ads will be critical in determining the efficacy of campaign messaging.



NEW EDUCATOR

CAMPAIGN

Go to www.nea.org/NewEdResources for toolkits, webinar recordings, and digital resources.

Email: NewEducator@nea.org

Web: nea.org/NewEd

2. Virtual Site Visits

Prepare

1. Choose a virtual platform.

Identify which virtual platform is most familiar to your local union for your worksite leaders to hold site-specific meetings. (e.g. Zoom, Teams, Google, etc.)

2. Create and delegate roles and responsibilities.

- **Tech Support:** Identify members who are willing to provide tech support for virtual site meetings.
- **Content Curator:** If the state or local affiliate wants to keep the information and message consistent, this individual would be responsible for coordinating a similar template and format.
- **Data Lead:** Identify a member who will be responsible for keeping track of members and potential members who have attended the virtual site visits so it can be noted in your organizing database.
- **Virtual Organizing Committee:** This group should be made up of all worksite leaders. They should be responsible for building the calendar of scheduled worksite visits at all schools, updating lists of their colleagues, driving turnout to the event, compiling data gathered from each worksite event, and attending trainings necessary to successfully execute the virtual site visits.
- **Recruitment Member Organizers:** Identify members who are willing to be a Member Organizer. They are responsible for engaging current members and recruiting potential members by sharing the value of their local association to the cause of public education. Member Organizers can assist with the follow-up after virtual phone banks via phone bank or having a one-on-one using a virtual platform.

3. Build up-to-date Member and Potential Member Lists.

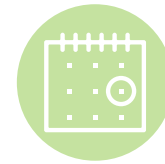
- Virtual organizing starts with good lists of members and potential members. For strategy ideas for acquiring potential member lists, see toolkit resources at www.NEA.org/NewEdResources.
- Check with your state's MMS team for the process of using the IMS Bulk Uploader tool to handle new lists of potential members. Resources on the tool can be found [here](#).



4. Build a layered turnout plan.

Send out invites prior to virtual site visits. Use email, text, and phone calls to invite members and potential members to virtual site visits. The union representative should send the email, calendar invite, and text to members and potential members in their building. Make sure you provide a video link and any additional information required to access the meeting.

- **Data tips:**
 - Use your state affiliate's Digital Engagement tools (e.g. Action Network, VAN Events, Mobilize, Hustle, and 360) to drive turnout to your meeting.
 - Use the following Campaign Name when creating Mobilize and VAN Events: Year-Round Organizing.
 - When using Hustle, remember to:
 1. Push your list from VAN into Hustle using the integration
 2. Use the "Share Link" Goal Type
 3. Add the VAN Event Integration to the goal
- Examples of using VAN Integrations in Hustle can be found here:
 - [General Hustle Resources](#)
 - [Example of Using Hustle, VAN and Mobilize Integrations](#)



Train

5. Train your Worksite Leaders.

Ensure you host a union virtual training to review the agenda for the virtual site visits. Use the training as an opportunity to train your leaders on how to use the video-conferencing platform. Provide a role play for your worksite leaders during the virtual training. Role play to practice a virtual site visit as part of the training with AR's. Test the technology ahead of time to ensure everything is working properly. Prior to the conversation, set clear objectives with local leadership. Set meeting ground rules.

At the Site Visit

6. Plan your agenda.

Develop an agenda with your staff contact and leadership team that will be used by every building representative in the local. The agenda should provide a place to give updates, generate discussion around members' and potential members' concerns, and assist people who would like to join the union. Minimize length of meeting to 30 minutes maximum. Meetings should have a discussion format.

SAMPLE AGENDA

- Welcome and check-in with an icebreaker.
- Review current legislation and any organizing campaigns going on at the national, state, and/or local level. Explain how people can get involved.
- Discussion around how people feel about going back to school in the fall and provide any updates from the district (have a notetaker to ensure you are addressing concerns with the district).
- Provide a list of upcoming local, state, and national events that members may be interested in to participate (make sure you attach a flyer and send one out after the visit).
- Membership—Every local meeting, whether in-person or virtual, should have a membership ask. If people have expressed interest in membership, make sure you have a follow-up one-on-one phone call or virtual one-on-one conversation.
- Wrap-up—Answer any questions or concerns.

7. During the Virtual Site Visit.

Set meeting norms and use an icebreaker to start the agenda so people can introduce themselves. Share all documents for the members and potential members to review. Share flyers, membership forms, and contracts. Depending on the types of documents, you may have it linked to your website or a file sharing site to ensure members and potential members have access. Capture real-time feedback.

8. Debrief the meeting itself.

Debrief with staff and local leadership. Identify what from the discussion was identified as areas of needs, advocacy issues, and e-learning successes and challenges to help inform what the union needs to put together.

Have a Follow-Up Plan

9. Follow up.

Follow up with members and potential members who attended the virtual site visit in case they still may have questions or concerns. Make sure you confirm everyone who joins the virtual site meeting, and make sure to follow up with each attendee one-on-one.

- Cross check your list of attendees, RSVPs, and Full Roster to verify who attended and who needs a follow-up.
 - Add attendance data to VAN or 360 depending on which system you used to create the event.
- Use Hustle and VAN's Virtual Phone Bank tool to follow up with all potential members who attended to make a membership ask.
- Use Hustle and VAN's Virtual Phone tool to follow up with all members who did not attend.
- Sample Hustle Scripts are available [here](#).



3. Virtual Platforms & Purposes

 <p>Facebook</p>	<ul style="list-style-type: none"> • List work • Boss research • “Public square” for workers who have engaged with the campaign • Differentiated groups for 0-3s, 2s, and 1s • Public-facing page to drive content engagement • Digital ads for the page, surveys, and petitions
 <p>Hustle Text Messaging</p>	<ul style="list-style-type: none"> • Utilize to set up one-on-one conversations • Engagement with workers who take an online action • Distributed leadership reflected in assigned turf • Action reminders, meeting invitations, etc.
 <p>LinkedIn</p>	<ul style="list-style-type: none"> • List work • Digital engagement ads
 <p>Twitter</p>	<ul style="list-style-type: none"> • Press outreach • List work (Who are our thought leaders? Theirs?) • Boss opposition research (What are they saying?) • Garnering public support • Worker/leader tests
 <p>Zoom (or other web conferencing)</p>	<ul style="list-style-type: none"> • Leader/organizer one-on-ones with workers • Group meetings (briefing, debriefing, planning, check-ins, etc.)
 <p>Email</p>	<ul style="list-style-type: none"> • Long-form information to workers • Drive petitions, surveys, and updates
 <p>Google Ads</p>	<ul style="list-style-type: none"> • Worker engagement • Public-facing narrative
 <p>Instagram</p>	<ul style="list-style-type: none"> • Worker engagement • Instagram live to engage and connect with audience
 <p>Website</p>	<ul style="list-style-type: none"> • Long-form communications • Information intake • Public-facing documents

4. Successful Online Member Organizing Programs

Program Component: Local Capacity Building Through Skill Development of Member Organizers

Traditional Pathway (How we've always done it)	Virtual Pathway (Our new reality)
<ol style="list-style-type: none"> 1. Organizing Training (Including intermediate trainings throughout the program) 2. Debriefing organizing conversations and providing feedback for member organizers 3. Access to opportunities within the Union for growth via leadership opportunities, new roles/assignments, etc. 4. Supporting and centering member organizer ideas for growth 	<ol style="list-style-type: none"> 1. Training via Zoom. Zoom allows for breakouts for smaller groups within the larger group discussion 2. Debriefing their organizing conversations via phone or Skype 3. Connect member organizers to online webinars and training opportunities, as well as building representative opportunities and trainings 4. Many of our educators likely have innovative ways to connect virtually. We should foster these conversations and embrace ideas that may provide long-term value to program

Program Component: Community Building Among Member Organizers

Traditional Pathway (How we've always done it)	Virtual Pathway (Our new reality)
<ol style="list-style-type: none"> 1. In-person training(s) 2. Social gatherings 3. Joint organizing collaborations 4. In-person meetings 5. Text groups, social media groups, i.e. Facebook 	<ol style="list-style-type: none"> 1. Zoom training, Microsoft teams, etc. 2. Google Hangouts video chats, Instagram Live gatherings, and intentional virtual social hours/icebreakers 3. Create pairs or teams to check in without staff 4. Virtual meetings, reliance on more social media groups 5. Same pathway

Program Component: Identification of New Leaders

Traditional Pathway (How we've always done it)	Virtual Pathway (Our new reality)
<ol style="list-style-type: none"> 1. Mapping through one-on-one conversations 2. Identifying those who step up during organizing efforts 3. Identifying those who can turn others out 	<ol style="list-style-type: none"> 1. Mapping via one-on-one phone or video conversations 2. Identifying those who have become activated via Hustle, Facebook groups 3. Create asks via texting, Hustle, and social media and see who can complete the asks (get signatures on a petition or get others to join a Facebook group)

Program Component: Issue Identification

Traditional Pathway (How we've always done it)	Virtual Pathway (Our new reality)
<ol style="list-style-type: none"> 1. One-on-one conversations 2. Surveys 	<ol style="list-style-type: none"> 1. Same pathway—virtually 2. Same pathway—virtually

Program Component: Successful New Employee Orientation

Traditional Pathway (How we've always done it)	Virtual Pathway (Our new reality)
<ol style="list-style-type: none"> 1. Access 2. Member leaders involved 3. Member recruitment 	<p>Virtual suggestions will be distributed shortly by the New Ed team, but some considerations:</p> <ul style="list-style-type: none"> • Online recruitment forms are vital to success • Screensharing allows us to share information that can answer new hire questions, e.g. contracts, policies, and member benefit information

Program Component: Member Recruitment and Retention

Traditional Pathway (How we've always done it)	Virtual Pathway (Our new reality)
<ol style="list-style-type: none"> 1. One-on-one conversations 2. Online and paper forms 	<ol style="list-style-type: none"> 1. Demonstrating value of union through supportive communications surrounding COVID-19 crisis 2. Providing access to webinars and other virtual educator tools 3. Consistent communications to the unit 4. Organizing around needs of community during COVID-19 crisis 5. Member engagement via virtual platforms 6. Membership asks via phone conversations or text/Hustle using recruit now

Program Component: Issue Organizing

Traditional Pathway (How we've always done it)	Virtual Pathway (Our new reality)
<p>Most successful member organizing programs incorporate issue organizing campaigns, which follow a traditional organizing model</p>	<p>Assigned staff can also assist in support by developing issue organizing plans</p>

Program Component: Facebook as Worker Scaffolding

Traditional Pathway (How we've always done it)	Virtual Pathway (Our new reality)
<p>Established communities of workers will belong to "groups." Groups are internal-facing communities for deeper discussions, leadership development, and committee work</p>	<p>A virtual campaign could utilize a public-facing "page" for worker engagement, community engagement, and potential viral growth. Facebook ads can drive bargaining unit members to the page. From there, OC members will engage (via Messenger or Hustle text) and connect them to the appropriate group</p>

5. Organizing Policy Parity

The NEA Center for Organizing Local Growth Team has developed the following guidance with the Center for Advocacy, the Center for Communications, and the Office of General Counsel to protect our state and local affiliates' ability to organize during a time of social distancing. Ultimately, we want to provide grass tops support for our affiliates to have the continued ability to organize members during social distancing, including access to any alternative forms of new employee orientations and union access to our potential members at worksites. We believe enacting these policy changes is essential to organizing for continued growth and strength into the school year.

The chart below represents current statutory and contractual guarantees for organizing in-person and added an equity lens for organizing in a COVID-19 environment. We want districts to follow the spirit of the contract, not just the letter.

This is being included in the [NEA's School reopening guidance](#) and should inform your policy work with elected leaders in states. We hope you'll consider sharing some of these recommendations with your state affiliate teams.

Status Quo	Equity during social distancing would look like...
Worksite Access: Union reps in buildings like other non-staff adults in school community	Assuming limited building access, establish union representatives as essential workers to guarantee their ability to reach members during shutdowns and/or access to buildings
Membership Sign-Up: Many unions organize online, but "wet" signatures still common	Secure employer agreements to honor and process electronic signatures and membership records, given need to join online and telephonically
New Hire Orientations: Often in-person	Guarantee association access to any virtual platform or worksite-specific orientation
Access to New Hires: Right to meet with new employees—often in-person	Guarantee ability to meet with new hires at social distance or virtually
Bargaining Unit and New Hire Lists: Right to access certain individual data	Expand data to include home addresses, personal emails, and telephone numbers in order to conduct socially distant home visits and/or contact members outside the worksite; deliver data electronically
Communicating with members & potential members through employer channels: Mailboxes, PA system, etc.	Expand communication with members and potential members through virtual employer platforms and media, including email, video conferencing channels, and payroll portals
New Hire Packets: Paper-copy union membership packet included	Ensure that mailed or electronic forms of onboarding include the union's membership packet and develop process to transmit the completed form to the union immediately

6. Collective Bargaining & Sample Contract Language

Access to members, potential members, and related information is vital to the union. Capturing these important items into contracts, policies, and/or handbooks further ensures the pathway for unions to engage in this aspect of organizational development work. During these times, even though the coronavirus may cause some work to be done virtually, exercising the union's rights to access people and information is still a key area of advocacy.

As an example, one area of access rights pertains to new employee orientations. Contract language concerning virtual new hire orientations focuses on the time allotted for the union to present itself to employees who are new to the district. It is essential for local union leaders and affiliate staff to be able to meet new employees so they can introduce the union, explain employee rights, describe available union resources, and provide an opportunity for employees to become union members. As such, solidifying aspects of the orientation program in the collective bargaining agreement is important.

Further, as an advocacy consideration, irrespective of these challenging times, any existing contract language should not be violated by the employer. Specifically, if the employer is unilaterally moving forward and changing any aspect of the new hire orientation program that is already outlined in the contract, the union may want to consider such advocacy approaches as filing grievances, demands to bargain, and complaints about unfair labor practices.

As you contemplate pursuing virtual avenues relating to any of the access areas in this document, here are some considerations:

- Advocate for district funding to cover any technology costs
- Research and determine which online platform (e.g. Zoom; Teams; etc.) will be used for the virtual session events
- Practice and offer training for the presenters who will be using the platform
- Set up digital registration for the events
- Send demonstration and instruction slides about using the online platform to the registered participants prior to the session event
- Consider, depending on the digital platform used, creating breakout rooms for interaction
- Create and set aside a few minutes at the beginning of the presentation to review housekeeping logistics using the digital platform, such as muting microphones
- Make the presentation information and related documents available to the participants both during and after the virtual session

The remaining portion of this document includes sample model contract language relating to the following areas:

- Access to New Hire Orientations & New Employees Upon Hiring
- Access to Worksites & Communicating with Members
- New Hire Packets
- Access to Bargaining Unit Lists & Data
- Joint New Employee Induction Team

Access to New Hire Orientations

NEA sample model language

All new hire orientations for new employees shall be jointly planned and co-sponsored by the union and the board of education. As part of the above mentioned overall new hire program, the union will have a minimum of four (4) hours to conduct a union new employee orientation program.

The union will have the option of creating its new employee orientation in a virtual setting or in an in-person setting. If the union chooses the virtual method, the district agrees to cover any digital costs for the program.

Pennsylvania State Education Association sample model language

During the initial induction period, (insert desired amount of time) will be given to the local association to meet and present to the inductees (new employee).

Maine Education Association sample model language

The Association shall have the right to meet with newly hired employees without loss of pay for a minimum of 30 minutes at any new orientation or, if no orientation is held, at a mutually-agreed upon time within 10 days of hire.

Access to Worksites & Communicating with Members and Potential Members

Ohio Education Association sample model language

The Union shall be permitted to make announcements at general staff meetings, building meetings, and total staff meetings at the end of such meetings and use the public address system for Union announcements subject to usual building procedures.

Union representatives may hold meetings of employees at any time prior to, during, or after the workday.

New Jersey Education Association sample model language

The Association or its designees shall have the right to use a school building at all reasonable hours for meetings.

Use of School Equipment

1. The Association shall have the right to use school facilities and equipment including but not limited to the public address system, computers and related technology, printers, typewriters, copy machines, other duplicating equipment, calculating machines, and all types of audiovisual equipment at reasonable times when such equipment is not otherwise in use.
2. The Association shall have the exclusive use of a bulletin Board in lounges, dining rooms, and other appropriate areas in each worksite. The Association shall also be assigned adequate space on the bulletin board in the district central office for Association notices. The Association shall designate the location of the Association bulletin Boards in each work area.

Mail Facilities, Mailboxes and Electronic Mail – The Association shall have the right to use the school mailboxes and the district's internal mail (...including e-mail...) delivery system.

Maine Education Association sample model language

The Association shall be permitted to use school facilities and equipment to meet with individual employees to investigate and discuss grievances, workplace-related complaints and other workplace issues, and to conduct meetings.

The Association shall be permitted to meet with individual employees during the workday without loss of pay, as long as it does not interfere with employee job duties, to investigate and discuss grievances, workplace-related complaints and other workplace issues. The Association shall be permitted to conduct meetings during lunch and other breaks, and before and after the workday.

New Hire Packets with Union Membership Packets

Pennsylvania State Education Association sample model language

Immediately upon hire, Inductees (newly hired employees) will be given printed copies of the following documents: (1) The collective bargaining agreement in effect between the employer and the certified bargaining agent. (2) Statutory and regulatory provisions related to the Induction Program. (3) Employment policies and regulations of the school board. (4) Pupil management policies and regulations of the school board. (5) Student handbook and teacher handbook. (6) Courses of study and/or other pertinent materials which have a direct bearing upon the tasks for which the Inductee was hired.

Access to Bargaining Unit Lists & Data

Maine Education Association sample model language

The Board shall provide the name, home mailing address (including street, city/town, state and zip code), pay range and step, position, job title/assignment, workplace location, date of hire, home phone/personal cell phone, full or part-time status, stipends, work telephone number, work e-mail address and home e-mail address for each employee upon hire and once annually thereafter.

(Note, this provision also includes information necessary to appropriately administer the contract, such as pay range and step.)

Ohio Education Association sample model language

The Employer shall provide the Union President with the names, addresses, phone numbers, building assignments, classifications, years of service credit, and pay rates of all employees and will update as new information becomes available, but no later than one (1) week after the meeting at which the Employer took action.

The Union shall have access to employee mailboxes and other facilities where mail is received and the use of the Employer's mail distribution systems which do not cross federal postal routes.

The Employer shall provide copies of the mutually-agreed upon Contract in pamphlet form within 60 days following ratification of the Contract by the Employer and the Union, to each employee. In addition, the Union shall be provided ____ () copies.

The Union President shall be provided with one (1) copy of all written policies, rules, regulations and procedures of the Employer and any subsequent amendments, and, in addition, copies of this information should be readily available at each building/work site.

The Employer shall furnish the Union information related to its financial and educational operation. Such information shall be provided to the Union within ten (10) calendar days of the receipt of the Union's request.

New Employee Induction Team

California Teachers Association sample model language

Leadership Team (Teacher Induction Program)

The majority of the members of the Leadership Team shall be teachers appointed by the association.

The Leadership Team shall:

- Establish its rules of procedure.
- Establish the selection process for mentors.
- Conduct an annual program evaluation and make recommendations for improvement.
- Develop comprehensive procedures to facilitate cooperation among eligible new hires, their teacher preparation institutions, and the district's Human Resources department.
- Establish criteria for recommending a clear credential that is clear, concise and publicly articulated.
- Develop an appeal process for induction participants who are deemed not to have completed the program.

Leadership Team members shall receive release time for meetings and other teacher Induction program activities and shall be paid their pro-rata hourly rate for meetings that take place before or after the contractual workday.

The Leadership Team shall ensure the Induction program is focused on the California Standards for the Teaching Profession.

The Leadership Team shall implement the Induction program only after the district and the association have met to review the program to ensure compliance with language in the collective bargaining agreement, including, but not limited to, teacher evaluation, professional growth, and professional rights.

Upon review of the program, the district and the association may submit, in writing, any comments/concerns to the Leadership Team. The Leadership Team shall respond, in writing, prior to implementation of the program.

The district shall furnish to the association, upon request or at least once annually, evidence that the district-sponsored Induction program does not require any teacher to perform at a higher level than is required by the Induction program standards.

Pennsylvania State Education Association sample model language

There shall be an Induction Team in each building for each Inductee (new employee). The Team shall be comprised of administrative, Association rep selected by the Association bargaining unit, and teacher educator personnel: one of each. The Induction team shall be empowered to identify the needs of Inductees, design the program, coordinate the program's operations, evaluate the program and make recommendations for revisions as needed. Recommendations made by the Team shall be promptly implemented.

Bargaining unit personnel who serve on the Induction Team (Mentor Teachers) shall be selected by the Association from a pool of volunteers. Support Teachers shall receive additional compensation as set forth in Article (insert #), Section (insert #), Page(s) (insert #) of this agreement.

New Member Organizing Sample Contract Language *(adapted from the New Jersey Education Association)*

The [Association] shall have the right to meet with newly hired employees, without charge to the pay or leave time of the employees within thirty (30) calendar days from the date of hire, during new employee orientations, or if the employer does not conduct new employee orientations, at individual or group meetings. Meeting duration time is up to 180 minutes, in no cases less than 30 minutes, with final duration of time needed to be determined by the [Association]. At the Association's prerogative, these meetings can occur virtually.

Within ten (10) calendar days from the date of hire of any employee, the Board shall provide the following contact information to the [Association] in an Excel file format or similar delimited style file format that has manipulability and has been agreed to by the [Association]. It shall include: name, job title, worksite location, home address, work telephone numbers, and any home and personal cellular telephone numbers on file with the Board, date of hire, and work email address and any personal email address on file with the Board.

During any closure in which remote learning is taking place or is anticipated to take place, the Board will include Association membership applications as a part of any employee onboarding paperwork that will be sent in hard copy or electronically to or picked up by any employee who is eligible for membership in the Association. At the Association's prerogative, the Board will attach a welcome letter from the Association to the application. The Board agrees to collect completed applications from any membership-eligible employee and turn them over to the Association for processing.

Data List Acquisition

Section 1:

At the beginning of each contract year, and at least every 120 days thereafter, the Employer shall supply the Union with the following information for each employee:

- name, home address, telephone number, cell phone number, and email address;
- employee identification number;
- most recent date of hire and seniority date(s), if different;
- job title, current assignment, work location, work telephone number, and work email address; and
- salary and/or any other form of compensation.

Section 2:

At the beginning of each contract year, and at least every 120 days thereafter, the Employer shall supply the Union with the following information for each employee:

- new hires, resignations, retirements, long-term unpaid leaves of absence, dismissals, and/or any other separations from employment; and
- any other changes in the information specified in Section 1 and the effective date of such changes.

Section 3:

The Employer shall furnish the Union with the information specified in Section 1 for each new employee within one week after his/her date of hire.