

# The Year-Round Organizing Campaign Local Affiliate Self-Assessment

The ***Year-Round Organizing Campaign Local Affiliate Key Strategies Self-Assessment*** was designed to assist local membership organizing teams in identifying areas of strength and opportunity in their year-round and back-to-school organizing campaigns. Consider using your results to assess local needs around the five key strategies and implement plans that build a framework for a year-round organizing strategy focused on membership growth.

## **The Self-Assessment\* describes three possible levels for each component:**

**Level 101:** Foundational: Understands processes and strategies for member recruitment, engagement, and retention.

**Level 201:** Mobilizing & Power-Building: Develops imaginative recruitment and retention strategies that continue to grow the Association's diverse membership and influence others to become more actively involved in the recruitment and engagement process.

**Level 301:** Agenda-Driving: Influences all members to own the agenda of the Association through their active participation and attitude towards collective action.

Note: It is likely locals will have a range of ratings, depending on strengths and challenges. For example, a Local Affiliate may assess themselves at the *101: Foundational* level in one area, but as *301: Agenda-Driving* in another area. The Self-Assessment offers specific, tactical insight on how to move from one level to the next. Reaching a rating of *301: Agenda-Driving* in any component is an opportunity to applaud success, test new innovative tactics, or invest deeper into successful tactics. Leaders at the 301 level may be asked to share their work with their colleagues in order to build capacity throughout our union.

\*Self-Assessment level language taken from [NEA Leadership Competency Guide](#)

# Local Self-Assessment on the Five Key Field Strategies of the Year-Round Organizing Campaign

## Key Strategy 1: Acquire Employee Lists

**Rationale:** Improve the processes and policies related to acquiring employee lists. Better list acquisition practices allow state affiliates to assess their member density and target their organizing resources.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>Does not request unit lists from District.</p> <p>Member and potential member lists are kept predominantly at the building level and are not shared with state.</p> <p>Inconsistent procedures for requesting, securing, cleaning, and processing lists into a state-designated database (e.g. VAN or NEA360).</p> <p>Building-level or local-level leaders know the potential members but are not tracking trends.</p> <p>Potential member lists include only information to be able to contact potential members at work.</p>	<p>List is asked for once a year from District, and potential member lists are given to all Building Representatives.</p> <p>List acquisition is a past practice but not formalized as part of contract language and/or school board policy.</p> <p>Active efforts to formalize list acquisition are happening through bargaining or district policy.</p> <p>List obtained has some contact information to be able to contact potential members outside of work locations.</p> <p>List is accessible to Union/Association leadership only and may not be in a format that is user-friendly.</p>	<p>State receives employee lists for all locals as new employees are hired.</p> <p>List acquisition is part of contract language, state legislation, and/or school board policy.</p> <p>Local works with state affiliate to reach out to former Aspiring Ed members and do a strategic ask.</p> <p>Procedure for requesting, securing, cleaning, and processing lists into a state-designated database (e.g. VAN or NEA360) is in place and happens at a regular interval throughout the year.</p> <p>Lists are accessible, in a user-friendly format, to key stakeholders (e.g. building representatives, membership chairs, Member Organizers, etc.).</p> <p>Local association has a designated person responsible for implementing the procedures listed above (i.e. membership chair).</p> <p>All local associations work with state affiliate to ensure that the state also has an accurate bargaining unit list with potentials.</p> <p>List obtained has personal contact information, including personal phone number, address, and personal email.</p>

**\*Best Practices:** [Strategy 1 Resource Link](#)

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## Key Strategy 2: Engage All New Hires Throughout the Year

**Rationale:** Engage with new hires, potential members, and current members before orientation and year-round. Reaching out before the orientation and year-round allows local leaders and building reps to initiate one-on-one conversations that establish the Association as a trusted resource.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>First contact to new hires by Association occurs at or after NEO.</p> <p>Local association does not receive new hire list prior to NEO.</p> <p>Local association has not yet prioritized resources for pre-orientation engagement activities.</p>	<p>Limited engagement or outreach by President or ECEs prior to orientation.</p> <p>Some Building Representatives are trained on the 1:1 curriculum and involved in reaching out to new hires.</p> <p>Some outreach to new hires occurs prior to orientation, but it is not systematic or sustained.</p> <p>Limited resources are available for pre-orientation engagement or are not utilized in a systematic way for all new hires.</p> <p>Some engagement events and 1:1s include a membership ask and tracking (Year-Round Organizing data) of the contact in VAN/NEA360.</p>	<p>Local association has a plan for engaging new hires through multiple contacts (3-7) between the date of hire and orientation.</p> <p>All Building Representatives receive standardized training on the 1:1 curriculum and new hire recruitment before the start of the school year.</p> <p>Locals utilize support from the state affiliate to engage Aspiring Educators (student members) and other graduating seniors at schools of education at hiring events.</p> <p>Majority of Building Representatives and a diverse group of Worksite Activists are actively involved in reaching out to incoming new hires and ECEs.</p> <p>All engagement events and 1:1s include a membership ask and tracking (Year-Round Organizing data) of the contact in VAN/NEA360.</p> <p>Local affiliate has dedicated resources to conduct pre-orientation engagements.</p>

\*Best Practices: [Strategy 2 Resource Link](#)

# Local Self-Assessment on the Five Key Field Strategies of the Year-Round Organizing Campaign

## Key Strategy 3: Make a Membership Ask at Every New Employee Orientation and Association Event

**Rationale:** Create a local plan to make a membership ask to every new employee at New Employee Orientation and any other Association led event. Make a game plan that helps your Building Representatives and worksite leaders approach, recruit, and follow up with potential members throughout the year. The below activities were developed focused on NEOs. In a Year-Round Organizing Framework these same activities should be considered for all Association led events to ensure a membership ask is made at every event.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>Local attempts to track number of new hires before orientation day.</p> <p>Building Representatives and worksite leaders from some worksites are present at the NEO/Association event.</p> <p>UniServ staff and local leaders lead the planning and execution of NEOs.</p> <p>No training is provided to ECEs, Building Representatives, and local leaders who volunteer for NEOs.</p> <p>Association has a presence at the NEO, but no time on the district agenda.</p> <p>Limited 1:1 organizing follow-ups occur at the NEO.</p> <p>Local affiliate does not keep up or prioritize several NEOs throughout the year. (Including ESP &amp; adjunct faculty, if applicable).</p> <p>Local affiliate has a limited system in place to assess NEO results and reconcile data to determine new members, identified potential members from YRO surveys, and new hires who have not been engaged yet.</p>	<p>Local has a system to track and engage new employees in all classifications.</p> <p>Building Representatives and worksite leaders from most worksites are present at the NEO.</p> <p>Local leaders and Building Representatives lead the planning and execution of NEOs.</p> <p>Limited NEO training is provided to ECEs, Building Representatives, and local leaders who volunteer for NEOs.</p> <p>Association has a presence at NEOs and makes a transactional presentation and membership ask to the new employee cohort.</p> <p>Intentional 1:1 organizing follow-ups occur at the NEO.</p> <p>Local affiliate leads on several NEOs scheduled throughout the year. (Including ESP &amp; adjunct faculty, if applicable).</p> <p>Local affiliate has a limited system in place to assess NEO results and reconcile data to determine new members, identified potential members from YRO surveys, and new hires who have not been engaged yet.</p>	<p>Every Association led event includes a membership ask.</p> <p>Building Representatives and worksite leaders from all worksites are present at the NEO.</p> <p>Local leaders, Building Representatives, and ECEs lead the planning and execution of NEOs.</p> <p>A comprehensive NEO training is provided to ECEs, Building Representatives, and local leaders who volunteer before the NEO day.</p> <p>ECEs and worksite leaders plan and deliver aspirational New Hire Orientations that are budgeted, adequately resourced, scheduled, and publicized by local affiliates.</p> <p>Worksite leaders execute 1:1 organizing follow-ups with all new employees at the NEO.</p> <p>Local affiliate leads on all NEOs scheduled throughout the year. (Including ESP &amp; adjunct faculty, if applicable).</p> <p>Local affiliate has a comprehensive system in place to assess NEO results and reconcile data to determine new members, identified potential members from YRO surveys, and new hires who have not been engaged yet.</p> <p>In the absence of a district-run orientation, the union holds their own NEO for all new hires.</p> <p>Community organizations partner with local on events to offer support to new hires.</p>

\*Best Practices: [Strategy 3 Resource Link](#)

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## Key Strategy 4: Organize Follow-Up One-on-One Conversations

**Rationale:** Focus on in-person follow-up conversations. Members are the most effective recruiters of new members. A strong follow-up plan supports Building Representatives and Worksite Activists in having targeted one-on-one organizing conversations with new and potential members at the worksite immediately following NEOs and other Association led events.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>The Local has a system to support, engage, and recruit most new employees hired at the beginning of the year.</p> <p>Incomplete or fractured Building Representative structure.</p> <p>Local does not have assessment of worksite density.</p> <p>Follow-up conversations occur but are not tracked by the local.</p> <p>No collaboration between local and state affiliate to train building reps to execute and track follow-up conversations and membership asks.</p>	<p>Local has an inconsistent system to support, engage, and recruit most new employees hired throughout the year.</p> <p>Local has an adequate Building Representative to member ratio (e.g. 1:10).</p> <p>Local supports some Building Representatives in having strategic follow-up conversations with all potential and new hires using the Year-Round Organizing data.</p> <p>Local has a process for giving state affiliate YRO survey data that includes frequent conversations, but it is not always smooth or followed with fidelity.</p> <p>Local has assessment of worksite density for some classifications and worksites, but not all.</p> <p>In worksites that do not have identified Building Representatives, Local attempts to identify a pathway for new leader engagement, especially for ECEs.</p> <p>Local tracks some follow-up conversation data.</p>	<p>Local has a strategic plan to support, engage, and recruit all new employees hired throughout the year.</p> <p>Local has a strong Building Representative structure that includes a pathway for new leader engagement, especially for ECEs.</p> <p>Local supports Building Representatives, Member Organizers, and Worksite Activists with training for follow-up with all members and potential members at each worksite.</p> <p>Local provides a consistent level of support, resources, and curriculum for Building Representative trainings.</p> <p>Local supports Building Representatives in using YRO survey data to hold follow-up conversations with new hires and potential members. Data that is returned from the state level is used regularly at the local level.</p> <p>Local has a consistent tracking system in VAN/NEA360 for new hires in each worksite, follow-up 1:1s, and new/potential member density.</p>

**\*Best Practices:** [Strategy 4 Resource Link](#)

# Local Self-Assessment on the Five Key Field Strategies of the Year-Round Organizing Campaign

## Key Strategy 5: Use Data to Plan Follow-Up Engagements

**Rationale:** Use data to drive decision-making and resource allocation. The Year-Round Organizing survey data identifies opportunities to develop organizing campaigns, issue-specific education, and professional supports.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>Local affiliate shares Year-Round Organizing data with state affiliate inconsistently.</p> <p>Local affiliate rarely collaborates with state association in using YRO survey data to plan programming and engagement events across the career continuum.</p> <p>Local affiliate has no targeted turnout plan for individualized conversations that lead to high attendance at engagement events.</p> <p>Local affiliate has sign-in sheets for engagement events, but rarely enters data into a useable database (e.g. VAN or NEA360).</p> <p>Local affiliate rarely uses YRO survey data to develop organizing campaigns, issue-specific education, and professional supports.</p> <p>Local affiliate rarely incorporates an aspirational membership ask in their engagement events.</p>	<p>Local affiliate collaborates with state association in using YRO survey data to plan programming and engagement events across the career continuum.</p> <p>Local affiliate has inconsistent targeted turnout plan for individualized conversations that lead to high attendance at engagement events.</p> <p>Local affiliate has sign-in sheets and/or electronic data collection methods for engagement events, but inconsistently enters data into a useable database (e.g. VAN or NEA360).</p> <p>Local affiliate inconsistently utilizes YRO survey data to develop organizing campaigns, issue-specific education, and professional supports.</p> <p>Local affiliate incorporates an aspirational membership ask in most of their engagement events.</p>	<p>Local affiliate strategically collaborates with state association in utilizing YRO data to plan Association programming and engagement events across the career continuum.</p> <p>Local affiliate supports all building reps and leaders in using YRO survey data to provide individualized conversations for turnout at engagement events.</p> <p>Local affiliate has sign-in sheets and/or electronic data collection methods for engagement events and consistently enters data into a useable database (e.g. VAN or NEA360).</p> <p>Local affiliate consistently uses YRO survey data to develop organizing campaigns, issue-specific education, and professional supports.</p> <p>Local affiliate incorporates an aspirational membership ask in all their engagement events.</p>

\*Best Practices: [Strategy 5 Resource Link](#)