

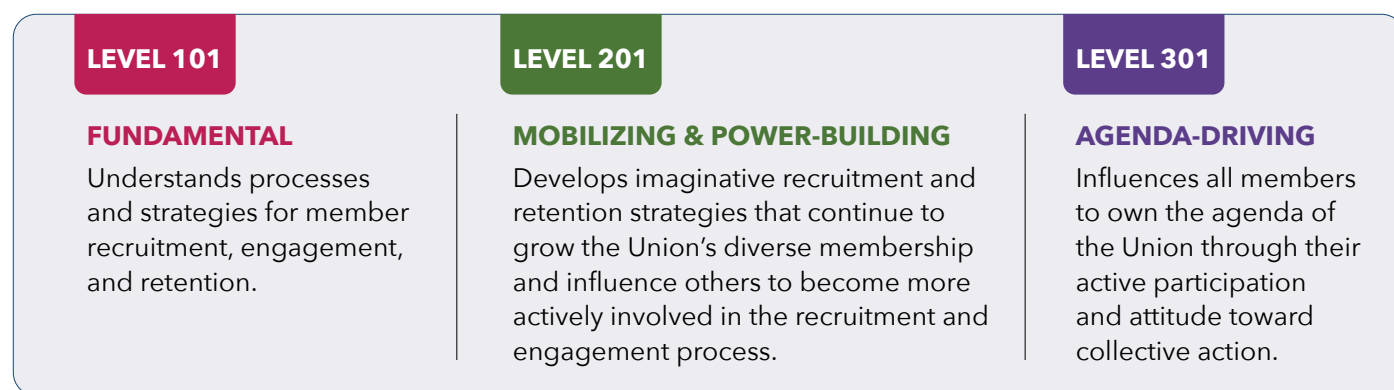
# THE YEAR-ROUND ORGANIZING

## CAMPAIGN STATE AFFILIATE SELF-ASSESSMENT

The Year-Round Organizing (YRO) Self-Assessment is a tool for state affiliates to use to assess the current state of their YRO program with the objective of eventually achieving a YRO program that is agenda-driving in each of the 7 Key Field Strategies.

State affiliates should complete the Self-Assessment with their full team and the Year-Round Organizing Campaign staffer assigned to their state prior to writing their campaign plan.

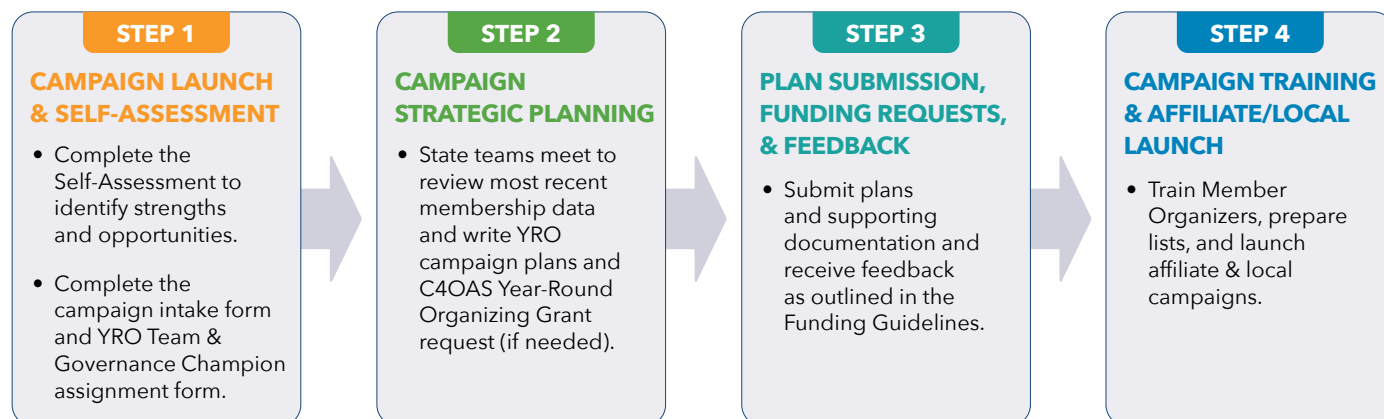
### The SELF-ASSESSMENT\* defines three levels for each of the 7 Key Field Strategies



\*Self-Assessment language taken from NEA Leadership Competency Guide

**Note:** It is likely states will have a range of ratings, depending on particular strengths and challenges. The rubric offers specific, tactical insight on how to move from one level to the next. Reaching **Level 301: Agenda-Driving** in any component is an opportunity to applaud success, test innovative tactics, or invest deeper. Leaders at Level 301 may be asked to share their work with their colleagues in order to build capacity throughout our union.

### Campaign Planning Workflow



# SELF-ASSESSMENT ON YEAR-ROUND ORGANIZING 7 KEY FIELD STRATEGIES


Key Strategy	Rationale	Level 101: Fundamental	Level 201: Mobilizing & Power-Building	Level 301: Agenda-Driving
1. Acquire, Use, and Manage Employee Lists	Improve the processes and policies related to acquiring employee lists, using lists, and managing lists effectively. Better list acquisition practices allow state affiliates to assess their member density and target their organizing resources.	Inconsistent about asking for potential member lists. Inconsistent statewide procedures for requesting, securing, cleaning, and processing lists into a state-designated database (i.e., NEA360 or VAN). State Membership Processors, UniServ staff, and/or leaders have limited knowledge of how to use and/or manage employee lists once obtained in the state-designated database.	Asks for/receives lists for some or most locals (i.e., only targeted or large locals). List acquisition is past practice, but not formalized as part of contract language and/or school board policy. Active efforts to win state legislation, contract language, and/or school board policy to acquire lists. State procedure for requesting lists at the local level is in place. List is accessible to union/union leadership only and may not be in a format that is user-friendly. State uses surround sound tactics (social media, telephonic organizing, email, and SMS/Hustle) to clean and improve lists. State Membership Processors, UniServ staff, and/or leaders understand how to use and/or manage employee lists once they are in the state-designated database. Leaders and/or UniServ staff use lists during back-to-school recruitment period to make a membership/activism ask. State adopts a standard business practice for requesting, securing, cleaning, and processing lists into a state-designated database (i.e., NEA360 or VAN) and this is done at least twice per year.	State receives employee lists for all locals as new employees are hired at least once per quarter. List acquisition is part of contract language, state legislation, and/or school board policy. State affiliate works to identify Aspiring Educator graduates (student members) and their first job. Procedure for requesting, securing, cleaning, and processing lists into a state-designated database (i.e., NEA360 or VAN) is in place and completed at least once per quarter. State affiliate has a designated primary contact responsible for implementing the business practices associated with list acquisition, use, and management. Lists are accessible, in a user-friendly format, so that Building Reps, membership chairs, Member Organizers, UniServ staff, etc. can use them to organize. All local unions designate a primary contact to work with the state affiliate to implement the business practices with list acquisition, use, and management. State uses surround sound tactics (social media, telephonic organizing, email, and SMS/Hustle) to clean and improve lists at least twice per year.
2. Engage All New Hires and Current Members Throughout the Year	Engage with new hires, potential members, and current members year-round. A plan for continuous year-round outreach allows local leaders, Building and/or Union Reps, and Member Organizers to initiate one-on-one conversations that establish the union as a trusted resource.	First contact with new hires by union occurs at or after New Employee Orientation (NEO). State affiliate has not yet prioritized resources for pre-orientation engagement activities.	Limited engagement or outreach by President or Early Career Educators (ECEs) prior to orientation. Some Building and/or Union Reps are trained to hold organizing conversations and involved in reaching out to new hires. Some outreach to new hires occurs prior to orientation, but it is not systematic or sustained. Limited resources are available from the state affiliate, but not utilized by the targeted locals for pre-orientation or YRO engagement. First contact with new hires by union occurs at New Employee Orientation and New Hires are asked to complete YRO Surveys for targeted locals.	State affiliate has a robust plan to support ECEs and local leaders in engaging new hires through multiple contacts between the date of hire, orientation, and year-round. All Building and/or Union Reps receive standardized training on the 1:1 curriculum and new hire recruitment before the start of the school year, from or supported by the state affiliate. State affiliates intentionally work with locals to engage Aspiring Educators (student members) and other graduating seniors at schools of education. All engagement events and 1:1s include a membership ask and tracking (YRO survey data) of the contact in NEA360/VAN. State affiliate has dedicated resources for targeted locals to execute pre-orientation engagements.
3. Make a Membership and PAC Ask at Every New Employee Orientation and Union-Led Event	Create a statewide YRO plan to make a membership and PAC ask at every union-led event. Make a game plan that helps local unions approach, recruit, and follow up with potential members.	Union is inconsistent in making membership asks of all new hires. Attendance at NEOs is mostly limited to staff and governance leaders. State affiliate sporadically tracks NEOs statewide for coverage and participation at the start of the year, and does not track throughout the year. ECEs attend and help recruit members at some NEOs. Union has a presence at NEOs, but no time on the district agenda, or is only the recognized sponsor for a meal. State affiliate has a system to track and cover NEOs in targeted locals only. Training is provided to individuals attending NEOs. PAC asks are inconsistent at union-led events and not all membership forms contain a PAC contribution ask.	Most union-led events include a membership ask and a PAC ask. State affiliate supports NEOs at the beginning of the school year and sporadically throughout the year. ECEs attend and help recruit members at some NEOs. Union member benefits partners participate in some NEOs at the start of the school year. Union has a presence at NEOs, but no time on the district agenda. State affiliate has a system to track and cover NEOs in targeted locals only. Some training is provided to ECEs, Building Reps, and local leaders who volunteer for NEOs and YRO, with no systematic plan for follow-up at the worksite. PAC contribution information is on the membership form. YRO survey data is used sporadically for follow-up with members interested in political action. State focuses on PAC contributions as part of their Representative Assembly, but not throughout the year.	Every union-led event includes a membership PAC ask. State affiliate supports all NEOs scheduled throughout the year (including Higher Ed, ESP, and urban districts). ECEs are a part of planning and delivering aspirational NEOs that are budgeted, adequately resourced, scheduled, and publicized by their state and local affiliates. Community organizations partner with the state and local affiliates on events to offer support to new hires. In the absence of a district-run orientation, the union holds their own NEO for all new hires. Trained ECEs, Building Reps, Member Organizers, and leaders work the NEO event and make membership asks following 1:1s with participants. State affiliate or locals have a system in place to assess NEO results and reconcile data to determine new members, identify potential members from YRO survey data, and new hires who have not been engaged yet. Active PAC committee uses YRO survey data to build rank-and-file engagement. State affiliate recognizes locals with the most recurring contributions to PAC by the highest number of members.

# SELF-ASSESSMENT ON YEAR-ROUND ORGANIZING 7 KEY FIELD STRATEGIES

Key Strategy	Rationale	Level 101: Fundamental	Level 201: Mobilizing & Power-Building	Level 301: Agenda-Driving
4. Organize Follow-Up Worksite One-on-One Conversations	Focus on in-person follow-up conversations. Members are the most effective recruiters of new members. A strong follow-up plan supports Building and/or Union Reps, Member Organizers, and worksite activists in having targeted one-on-one (1:1) organizing conversations with new and potential members at the worksite focused on issues and built on relationships, trust, and experience.	<p>Follow-up conversations with new hires and potential members occur but are not tracked by the state and/or local affiliate.</p> <p>Inconsistent collaboration between state and local affiliates for organizing conversation training for NEO follow-up 1:1s.</p> <p>State affiliate's assessment of Building and/or Union Rep density is minimal or incomplete and not updated regularly in NEA360 or other database.</p> <p>Building and/or Union Rep structure at the local level is inconsistently supported by the local and state affiliate.</p>	<p>State affiliate supports some training of Building and/or Union Reps and Member Organizers for follow-up conversations with new hires and potential members that includes the organizing conversation model, mapping, and data management.</p> <p>State and local affiliate tracks some follow-up conversation data.</p> <p>Local affiliates have an adequate member-to-Building and/or Union Rep ratio (i.e., 10:1) that is reported and tracked by the state affiliate in NEA360 or other database.</p> <p>State affiliate supports some specifically targeted locals in using the YRO survey data to have strategic conversations with all potential members and new hires.</p> <p>State affiliate has a YRO survey data process that includes frequent uploads of conversations, but it is not always smooth or followed with fidelity.</p> <p>State affiliate frequently uses Member Organizers to follow up with potential members who did not join during initial contact with the union.</p>	<p>State affiliate supports training of members in various roles for follow-up with all members and potential members at each worksite. Training includes: listening, asking probing questions, getting a commitment, leader ID, making the membership ask, etc.</p> <p>State affiliate provides a consistent level of support, resources, and curriculum for Building and/or Union Rep and Member Organizer trainings.</p> <p>State affiliate supports all local unions in using YRO survey data to hold follow-up conversations with new hires and potential members (i.e., Member Organizers are regularly used for follow-up). Data is returned regularly from the state level to the local level and entered in VAN/NEA360.</p> <p>State affiliate supports all local unions in prioritizing natural leader identification in worksites without Building and/or Union Reps.</p>
5. Use YRO Data to Drive Decision-Making, Plan Campaigns, and Offer Engagement Opportunities	The YRO Campaign survey data identifies opportunities to develop activists, organizing campaigns, issue-specific education, and professional supports that can be used to execute meaningful engagements that help win campaigns.	<p>YRO survey data is inconsistently collected and reviewed for top-line take-aways only.</p> <p>YRO survey data is not used for individualized conversations to drive turnout to engagement events.</p> <p>Building/Union Reps and/or Member Organizers are not aware of or encouraged to use YRO survey cards as part of their 1:1 follow-up conversations.</p> <p>Participants at engagement events sign in, but the information is not regularly tracked in a statewide database (i.e., VAN/NEA360).</p> <p>Minimal collaboration exists between state and local affiliates to share YRO survey data, plan engagements, or drive turnout for planned engagements.</p> <p>YRO data is used to plan PD events, but there is no aspirational membership ask with minimal follow-up.</p>	<p>State affiliate tracks some engagement events in a statewide database (i.e., VAN/NEA360).</p> <p>Participants at some of the engagement events are tracked in a statewide database (i.e., VAN/NEA360).</p> <p>YRO survey data is reviewed once a year to identify emerging leaders and new members for activist roles in campaigns.</p> <p>YRO survey data is used sporadically for individualized conversations and occasionally used to drive turnout to engagement events.</p> <p>YRO survey data is used to plan relevant PD with a membership ask.</p>	<p>State affiliate tracks all engagement events and participants in a statewide database (i.e., VAN/NEA360).</p> <p>YRO data is routinely used to develop emerging leaders and co-create member-led issue campaigns.</p> <p>YRO data is continually reviewed at all levels for individualized conversations and to drive turnout to engagement events.</p> <p>YRO survey data is used to inform decisions around planned programming and developing issue campaigns.</p> <p>YRO data is used to plan relevant PD that encompasses an aspirational membership ask with routine and robust follow-up.</p>
6. Strengthen Leadership Structures at Every Worksite	A diverse group of natural leaders exists in all workplaces. It is essential to identify them, train and support them, and offer them pathways to use their skills to move others to action.	<p>Some locals have an identified leadership team and executive board.</p> <p>Statewide practice for tracking leadership roles in the NEA data ecosystem is inconsistent.</p> <p>There is a statewide system of committees that represent the affiliate's diversity.</p> <p>Local leaders are inconsistent about sharing information with their members.</p> <p>Identification of new leaders/activists is inconsistent, with no formal assessment of activists.</p> <p>A clear pathway to further engagement and leadership roles in the union is not articulated to most members.</p> <p>A membership committee exists in some locals and at the state affiliate level.</p>	<p>Most locals have an identified leadership team and executive board.</p> <p>Statewide practice for tracking leadership roles in the NEA data system is consistent.</p> <p>There is a statewide system of committees that represent the affiliate's diversity, and committees meet regularly.</p> <p>Local leaders share information with their members when asked by state leadership.</p> <p>Worksite leadership roles are undefined or sometimes vacant in a majority of locals and are not tracked in the NEA data ecosystem.</p> <p>Some new leaders and activists are assessed using a behavioral scale with occasional asks.</p> <p>Lead Member Organizers coach other members in organizing with staff support.</p> <p>A membership committee exists in most locals and at the state affiliate level.</p>	<p>All locals have an active, identified leadership team and executive board that reflects the affiliate's membership diversity.</p> <p>Leadership roles are tracked in the NEA data ecosystem and updated as part of a yearly business operational process.</p> <p>There is a system to identify new leaders and activists that uses an assessment system tracked in VAN/NEA360.</p> <p>Member engagement and recruitment is led by members with staff support.</p> <p>Membership committees, contract action teams, bargaining teams, and other committees of members exist to lead the union's strategic priorities.</p>



# SELF-ASSESSMENT ON YEAR-ROUND ORGANIZING 7 KEY FIELD STRATEGIES

Key Strategy	Rationale	Level 101: Fundamental	Level 201: Mobilizing & Power-Building	Level 301: Agenda-Driving
<div>7.</div> <div>Build a Robust Communication System Within Your Union</div>	Communication structures facilitate two-way communication between rank-and-file members and leadership that purposefully emphasizes transparency and democratizes decision-making.	<p>The state affiliate data management system has a home email and phone number for at least 75% of all members.</p> <p>A consistent email program reaches members, but not potential members.</p> <p>The state affiliate website is updated regularly and offers contact information, links to locals, and an easy-to-find join link. Some locals have a website and/or Facebook page with an easy-to-find join link.</p> <p>State affiliate has carefully chosen which social media channels to use and keeps them regularly updated.</p> <p>The state affiliate collects YRO cards and uses the information to subscribe potential members for an NEA email journey.</p> <p>The state affiliate communicates statewide success stories and wins to members and potential members.</p> <p>The state affiliate offers communications training to local presidents and leaders.</p>	<p>The state affiliate data management system has a home email for at least 80% of all members and collects potential member home emails and phone numbers. This contact information is updated at least once a year.</p> <p>The state affiliate and the majority of locals have a website that is updated several times a year and has an easy-to-find join link.</p> <p>Emails to members have follow-up asks and provide opportunities for two-way communication and member feedback on the content.</p> <p>The state affiliate collects YRO cards and uses the information to target potential members with specific asks or information based on the responses.</p> <p>Surround Sound tactics are used intentionally during each phase of the YRO campaign.</p> <p>The state affiliate uses YRO cards to build hotlists for statewide use.</p> <p>The state affiliate uses hotlists to target engagement opportunities to members and for recruitment of new members.</p> <p>The state affiliate collects and communicates state and local success stories and wins.</p> <p>The state affiliate cross-posts on various social media platforms.</p>	<p>The state affiliate data management system has a home email and phone number for at least 90% of all members and collects home and email for potential members. This contact information is updated twice a year.</p> <p>Emails to members and potential members communicate wins, make follow-up asks, and provide opportunities for two-way communication with the union.</p> <p>The state affiliate collects YRO cards and uses the information to target potential members with specific asks or information based on the responses.</p> <p>Surround Sound tactics are used intentionally during each phase of the YRO campaign.</p> <p>The state affiliate uses YRO cards and builds and uses hotlists to target engagement opportunities to members and for recruitment of new members.</p> <p>The state affiliate cross-posts on their social media platforms, inviting member and potential member interaction.</p> <p>The state affiliate and the majority of locals have websites and/or a Facebook page that is updated frequently and has easy-to-find join links.</p> <p>A majority of locals have a social media presence besides Facebook and use it to share local information and amplify state and national posts.</p> <p>The state affiliate supports locals in creating a plan for two-way communication between members, the state affiliate, and the local union.</p> <p>The state affiliate shows responsiveness to member interests and needs by developing programming from YRO cards and other sources of input.</p>
Surround Sound	Rationale	Level 101: Fundamental	Level 201: Mobilizing & Power-Building	Level 301: Agenda-Driving
<div></div> <div>Anchoring Surround Sound in the 7 Key Strategies</div>	Use Surround Sound tactics to layer digital and other innovative organizing tactics into your field plan.	<p>Focus on opening “doors” to the union online.</p> <p>Set up ‘Join Now’ through NEA or an alternative online join system.</p> <p>Audit local affiliate websites and Facebook pages for effective join messaging and a Join Now link.</p> <p>Incorporate text JOIN and text CONNECT to 48744 at virtual and on-the-ground meetings and events to deliver membership forms and YRO survey forms to potential members on their phones.</p>	<p>Build strong, durable list acquisition systems to fuel digital organizing.</p> <p>If potential member data is not readily available, consider launching an EveryAction petition or hosting an event to collect personal information.</p> <p>Use the Year-Round Organizing card to collect data and guide follow-ups.</p> <p>Identify tools like email, social media, Hustle, Telephonic Organizing, and digital advertising using digital influencers to layer over a field program.</p> <p>Integrate Telephonic Organizing into your YRO (Year-Round Organizing) plan to:</p> <ul style="list-style-type: none"><li>Recruit members.</li><li>Raise PAC (Political Action Committee) money.</li><li>Clean lists.</li><li>Tackle immediate concerns (like bargaining).</li></ul>	<p>Leverage simultaneous, multi-channel communications to create a “surround sound” effect to amplify your message and support a field plan.</p> <p>Use online leads to narrow down in-person follow-up.</p> <p>Develop a strategy for pushing leads through an outreach cycle based on experimentation.</p>