

# NEA's Worksite Leader Training Guide

## The Fundamentals of New Hire Organizing

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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.

# How to Use the New Educator Campaign Training Template

This guide will train worksite leaders in the fundamentals of organizing with the New Educator campaign. Each module is self-contained and can be modified to fit the specific local Association's needs. Together, the five modules will empower worksite leaders to recruit and retain new members to strengthen their union.

## **Module 1: Local Association Self-Assessment**

The first module asks worksite leaders to self-assess their local Association in terms of recruiting and engaging members. The remaining modules provide resources to strengthen the skills necessary to grow the Association.

## **Module 2: Talking to New Educators & New Hires**

This module provides a framework to train worksite representatives for authentic one-on-one organizing conversations with potential members to identify issues and make the membership ask. It includes guidance for follow-up conversations and increasing engagement.

## **Module 3: Membership Asks**

To make a strong membership ask, leaders must understand the heart of their organization, or its "why?", and the head of their organization, or its "what?". Participants will understand that their Association exists to strengthen their voice and to collectively build power for their students and public education.

## **Module 4: Dues & Tough Questions**

This module provides best practices when answering frequently asked questions from potential members. A calculator is provided to transparently explain how dues are determined.

## **Module 5: Mapping**

Being able to discern trends and patterns in your worksite is an essential tool for worksite representatives. This module guides worksite leaders through a mapping exercise to visually chart their workplace and discover trends.

# MODULE 1:

## Local Association Self-Assessment

Rate each statement with this scale.

- A. The statement is true of your worksite.
- B. It's mostly true.
- C. It's barely true, or not true at all.

### 1. List Acquisition

For more resources on list acquisition, contact [neweducator@nea.org](mailto:neweducator@nea.org).

- ☐ The Association regularly receives lists of all employees within the bargaining unit.
- ☐ There is state legislation/contract language that requires Districts to provide employee lists to local Associations.
- ☐ Employee lists, with members and potential members, are entered into a database to plan recruitment and engagement.
- ☐ Lists are shared with local leadership, building reps, and worksite leaders for further outreach.

### 2. Pre-Orientation Training and Outreach

- ☐ Member leaders are recruited to outreach to new hires, potential members, and current members.
- ☐ Member leaders are trained on building-mapping and effective one-on-one conversations.
- ☐ New Hires have at least one contact from the union before their New Hire Orientation.

### 3. Effective New Hire Orientations

For more resources on New Hire Orientations, contact [neweducator@nea.org](mailto:neweducator@nea.org).

- ☐ The Association has time on the agenda to speak to all New Hires.
- ☐ There are members from all worksites to speak with potential members.
- ☐ An Early Career Educator shares the union vision or personal story at the front of the room.
- ☐ There are trained member organizers to have one-on-ones and small group conversations about the Association and the importance of joining.

### 4. Follow-Up Conversations

- ☐ The Association has frequent conversations about membership and growing the local.
- ☐ Worksite leaders follow up with all potential members who did not join at the New Hire Orientation to do a membership ask.
- ☐ Conversations are tracked in a database.
- ☐ All members and potential members are asked about ways their Association can support them in the upcoming year.

### 5. Year-Round Engagement

- ☐ Association reps are frequently given updated membership lists and hold regular meetings/conversations with all members.
- ☐ There are activities throughout the year that support New Educators based on New Educator data.
- ☐ There are multiple ways that Early Career Educators can be active in their union with a path towards future leadership.
- ☐ The Association uses New Educator and other survey data to plan membership recruitment, identify leaders, and engage all members in their Association.

### Mostly C's: Foundational.

Your Association understands processes and strategies for member recruitment, engagement, and retention. Reflect on the five areas to determine which one needs more time and resources to move your local to the next level.

### Mostly B's: Mobilizing and Power Building.

Your Association 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. It's time to refine your skills to further grow your Association.

### Mostly A's: Agenda Driving.

Your Association influences all members to own the agenda of the Association through their active participation and attitude towards collective action. Think strategically about how you can harness the power of collective action to develop leaders and win on key Association objectives.

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



# MODULE 2: Talking to New Educators & New Hires

One-on-One Conversations with New Educators (“AHUEY” Model)

Link to NEA one-on-one conversation video: <https://www.youtube.com/watch?v=WY0usX7IIZo>

One of the most important things you can do as an organizer is **listen**. Start by asking your colleague about how their year is going and what they know about unionism. Remember why you joined your Association and share your story authentically.

In organizing, we often use the “AHUEY” model. This represents an outline of the key components of an effective one-on-one conversation.

## Agitate

Validate their issues.

“I understand that.” “How does that make you feel? Is that frustrating?” “What is the impact on you? Your students? Your family?”

## Hope

Why is the UNION the solution?

“What can we collectively do together to fix the problem?”

## Urgency

“Clearly, these issues aren’t going to change on their own... it’s time for people like you who really care to start leading a change. The longer we wait, the worse it gets.”

## Educate

Explain what’s being done (or what can be done) to address these issues. Educate them about the union, including: mission, vision, purpose, dues, victories, benefits, etc.

## Your Ask for Commitment

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

Non-Members → “Will you join the Association in fighting for educators and our students?”

Members/Supporters → Give them assignments: “With your help, we can make a change... but we can’t do it without you.”

## Other Reminders

- Creating Tension / Uncomfortable Silence (Count to 10)
- Listen 80% / Speak 20%
- Follow Up: How? When?
- Identify Leaders

## Tips for Follow-up Conversations:

Sometimes it takes more than one conversation for a potential member to decide to join the Association. This section provides a framework for follow-up conversations with New Educators about how the Association is improving their working conditions and advocating for students.

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

- They care about a problem.
- There are tools to fix this problem within their union.
- That if they really want these challenges fixed/solved, they have to join you and your other colleagues in taking action and becoming members.

### DISCOVER—Listen to their concerns:

The beginning of the school year can be daunting, especially for New Educators. Ask general questions to learn what your colleague cares about:

- What are you most excited about?
- What are you most anxious about?
- Why did you choose to work at your school?

### AGITATE—Go deeper on the issue:

Listen to what they tell you and ask follow-up questions. This allows them to be angry or anxious and encourages them to be more open. Even if you are dealing with a very pointed single issue, don't leap straight into "Will you sign this?" Instead, hear more about their specific concerns to get a sense of how this issue affects them and their students.

### EDUCATE—Offer hope:

Hope comes from having power in numbers and a winnable plan. Tell them about a recent victory or an issue that the Association is working to solve. The issues facing educators today are best solved through collective action.

### ASK—Be part of the solution:

Ask the New Educator to be a part of the solution by taking a specific action. If they have not joined yet, ask them to become a member. If they are already a member, ask them to become more involved with a particular issue.

### FOLLOW UP—Agree on the next step:

Remember, you're trying to increase engagement throughout the Association. Set a time to check back in about how the next step is going. The more active the membership is, the stronger the voice for public education. Don't forget to track the conversation in a database for further collaboration.

## REMINDERS ON ACTIVE LISTENING

**Avoid distractions.** Look the other person in the eye and put your phone away.

**Slow down.** Focus on what is actually being said.

**Do not interrupt.** Take the time to hear the full story.

**Keep an open mind.** Don't assume you already know what someone cares about. People will surprise you.

**Do not fish.** Avoid leading questions like "Don't you agree that..."

**Practice empathy.** Your immediate task is to hear what they have to say, NOT to judge.

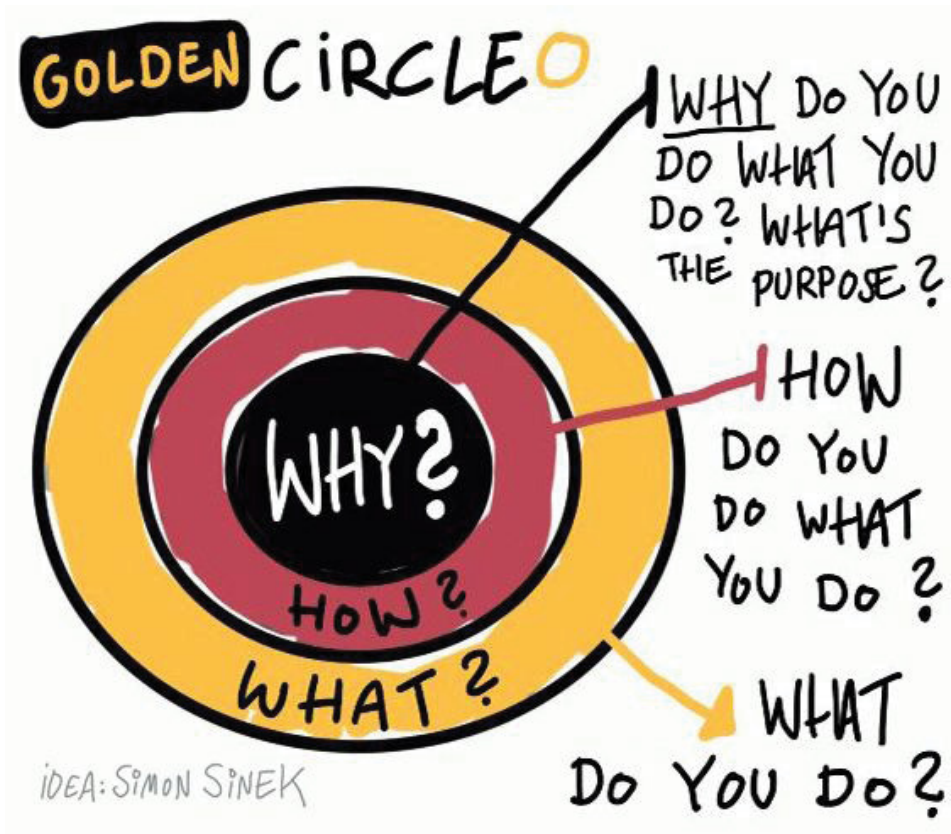
**Show that you hear what they are saying.** Listen, ask follow-up questions, and repeat back what you understood. If you don't understand, ask.

**Find common ground.** Look for areas of agreement and acknowledge where you differ.

**Don't feel you need to sell something.** You're genuinely looking to learn the other person's point of view and create something new together.



## MODULE 3: Membership Asks



### What is Your Why?

(Show one of these videos before starting this portion)

Simon Sinek—Start with Why: <https://www.youtube.com/watch?v=IPYeCltXpxwn>

Michael Jr.—Know your Why: <https://www.youtube.com/watch?v=1ytFB8TrkTo&t=2s>

### Golden Circle Graphic

What is my why? Why did I become an educator?

Why am I a member of my union?

What is my union's why?

# B.R.A.G. Sheet

## B.R.A.G. Sheet

This space gives you tools to brag about your Association and all the good work it is doing on behalf of students and educators.

<p><b>Benefits</b> – What are the advantages of membership in our union? (i.e. a collective voice for public education)</p>	<p><b>Resources</b> – How does my union support me and help me be the best educator I can be?</p>
<p><b>Achievements</b> – What have we achieved that makes a difference in the lives of my students?</p>	<p><b>Goals</b> – What achievements are we (or should we be) working to accomplish that will make a difference in the lives of my students?</p>



# MODULE 4: Dues & Tough Questions

## Explaining Your NEA/SEA/LEA Unified Dues

It is essential to understand and explain our unified membership dues structure to new potential members. Use the calculator below to calculate a new member's dues.

**Certified Full-Time Professional**

	Cost	Per Pay Period
NEA		
+ State EA		
+ Local EA		
= Total Cost		

**Education Support Professional (ESP)**

	Cost	Per Pay Period
NEA		
+ State EA		
+ Local EA		
= Total Cost		

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

**Know your total dues amount, but explain in cost per pay period or interval.** "Our dues are \$32 a pay period."

**Understand the methods for payment in your local area and state.** (Payroll deduction, e-dues, check, credit card, etc.)

## NEA Dues Fact Check

- ✓ **Dues are a collective investment** and a way to build power for working educators. The strength of the Association is in our members and how we improve the lives of students. On average, unionized educators enjoy higher wages and have better health insurance, pensions, and job security than do unorganized educators.
- ✓ **NEA doesn't set the dues – our members democratically do.** Only delegates to the NEA Representative Assembly, who are elected by our local or state Association, can vote to increase our dues. States set their dues at their State Representative Assembly and likewise for locals at their local annual meeting.
- ✓ **NEA dues allow us to raise our collective voice** at the national level, respond to legislative crises in the states, and give grants to state and local affiliates to implement innovative programs that benefit students. Together we are nearly 3 million members strong and represent the largest labor union in the United States.



## Answering Tough Questions: Affirm—Answer—Redirect

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

**Affirm:** Let them know you're listening, you understand, and their feelings are valid. Don't get mad at them—validate and educate them.

**Answer:** Give a truthful, concise answer to the question. If you don't know the answer, don't guess. Tell them you'll find out and get back to them.

**Redirect:** Once you've answered the question, bring the conversation back to your message.

Below are some simple answers to tough questions. You can use these or other answers, but follow the process of **affirm, answer, and redirect**.

QUESTION	AFFIRM	ANSWER	REDIRECT
<b>Dues Costs:</b> "I think dues are too expensive."	I can understand why you would be concerned about dues.	The dues are _____. The way our dues work is _____.	There are two ways that we get our power as a union. Money and people.
<b>Free Riders:</b> "Why do I have to join? I can get the benefits without paying for it."	I can understand why you would feel that way.	Currently, (% of members) of our colleagues pay dues because they see how membership strengthens our power as educators.	As you know, we are trying to solve (insert issue here) this year. We need everyone involved to win this fight. Will you join?
<b>Bad/Lazy Workers:</b> "I have heard that unions just protect lazy or bad teachers. Why would I want to support bad educators?"	I can understand your concern.	A union is about having a fair set of rules that apply to everyone. There is a process for those unable or unwilling to do their job.	The union is focused on strengthening the voices of educators about issues that concern us. (Specify an issue you have heard).
<b>Futility:</b> "Why should I be involved with the union? The union can't do anything about (issue)."	I can understand your concern. This (issue) can be challenging to address.	In fact, union members have been able to get (issue) language into many of their contracts.	Right now this is a decision that is solely up to management. As a union we can fight to be a part of the process.
<b>Strikes:</b> "My superintendent told me the only weapon that the union has to get good agreements is to go on strike."	I can understand why you would be concerned. Nobody ever wants to go on strike.	The only time there is a strike is when an overwhelming majority of your co-workers vote to go on strike. Only you and your co-workers can make this decision.	The superintendent understands that you negotiate good contracts every year. They want to talk about strikes instead of the issues that concern you. (Specify their issue).
<b>Self-Interested:</b> "I have heard that teacher unions care more about themselves than their students. I care about the kids, I'm not selfish."	I can understand your concern.	There have been years of attempts to discredit educators. NEA is a strong and consistent voice for students and for public education.	Teachers get involved in their unions because they know that their working conditions affect the ability of their students to learn. When educators come together, they make real improvements in the lives of students.

# Module 5: Mapping

## Basic Mapping: Learning the System

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

Blue	Yellow
✓ Current members.	✓ New hires, unknowns, and people who say dues are too high. ✓ You will spend most of your time building relationships with this group. ✓ Majority of your potential members.
Green	Red
✓ Have said they'll join but never followed through. Should be fairly easy to sign. ✓ Very few of your potential members are likely to fall in this category.	✓ Those who have been vocal and negative about the Association. ✓ Should be very few people.

## Advanced Mapping: Connections & Trends

Now that you've prioritized your potential members and are starting to see your membership increase, it's time to take your mapping deeper.

### Steps:

1. You're going to need a map of your worksite (if your worksite isn't just one place, e.g. bus drivers, use a chart).
2. On your map, write down each member's name, and highlight his/her name with the same color you used on your roster.
3. Current members should be highlighted in blue, and those members who are strong leaders should be circled.
4. Once you have your map and chart highlighted, look for trends:
  - a. Is one area full of yellow potential members? What is the best strategy for reaching them for follow-up conversations?
  - b. Is one department strong in membership? Can a leader in that department talk to potential members in other departments?
  - c. Are any of your members people who get to see most of the workforce (i.e. special education teachers, specials teachers, librarians, district maintenance workers)? Think about how to get these members to be leaders.
  - d. Is one area mostly red? Is this due to one or two negative people? What are their issues? Can potential members be reached out to before they hear the negative message?
  - e. Is one department/job classification mostly yellow? Why do you think this is? Have you developed a strategic plan to reach out to them?
  - f. Are all your baby boomers blue and your millennials yellow? How are you reaching out to millennials?
5. Next, look at the notes you wrote down. Do you see any trends there?
6. For units that include shift workers or many non-classroom ESP positions, the next step for advanced mapping can be charting based on schedules.

Mapping Reminders

- 1. Mapping rosters, maps, and charts should not be shared outside of those actively building the plan for membership (officers, UD's, membership chair, AR's, etc.).
- 2. Mapping is only useful if it is accurate. Set aside 10-15 minutes of each AR meeting to check the mapping data and update as needed. Talk about challenges and see if there are connections elsewhere that can assist.
- 3. Celebrate your successes!

Examples of Charting

