



THE UNION OF VERMONT EDUCATORS

## **Virtual Membership Campaign Guide**

### **August 2020**

### **Introduction**

It is now more important than ever that the union develops digital tools and strategies to supplement traditional, face-to-face methods of engaging and recruiting potential members. COVID-19 safety protocols will likely limit the ability of local leaders and membership contacts to engage potential members with an in-person membership ask. To adapt to this new reality and protect the health and safety of members and students, NEA and Vermont-NEA have developed a number of resources for conducting all-virtual membership campaigns at the local level this fall.

While these resources and strategies will hopefully strengthen our membership recruitment efforts moving forward, we recognize that they will never replace face-to-face organizing, which is always the most effective approach to building relationships and strengthening our membership. This document is meant to be a brief guide to conducting a virtual membership campaign in your local.

### **How to Conduct a Virtual Membership Campaign**

The goals of a virtual membership campaign are the same as those of a traditional, in-person campaign. We want to:

- Introduce new employees to the union
- Establish a connection to new employees and begin to build a relationship
- Ask them to join the union
- Develop new educators into active union members and potential leaders

There are five basic steps to conducting a virtual membership campaign.

#### ***Step 1. Acquiring New Employee Information***

A successful membership campaign, virtual or otherwise, depends on access to information about the potential members in the bargaining unit. This information should be provided by the employer upon request by the local. *Locals should get in the habit of requesting full bargaining unit lists from the district that contain the following information: employee names, job classifications, work locations, home addresses, personal email addresses, home*

*phone numbers and cell phone numbers.* Unit lists are critical to starting a membership campaign because they...

1. Allow locals to determine their membership density (percentage of bargaining unit employees who are dues-paying members);
2. Identify potential members and new hires; and
3. Provide work location, email and phone number to engage potential members

As the exclusive bargaining agent for all employees in the unit (both members and potential members), the local has an expansive right to employee information, including personal contact information. Personal contact information is even more critical during the COVID-19 pandemic given the likely limitations on in-person access to potential members. At minimum, locals should request detailed information on new hires from the district for the purposes of scheduling new employee orientations and other kinds of virtual engagements. **See the sample email request for new employee information below.**

If your district refuses to provide you with an employee list, or excludes contact information from the list, please contact your UniServ Director who will refer the refusal to Vermont-NEA legal counsel.

### ***Step 2. Initial Contact***

Once you know who the new employees are and how to contact them, you should reach out with an initial email that...

- Welcomes them to the district;
- Briefly introduces the union as a community of educators;
- Invites new hires to a virtual union orientation; and,
- Makes an initial membership ask

**See the sample email to new hires below.**

### ***Step 3. Virtual Orientation***

A virtual new employee orientation is an excellent opportunity to communicate directly to new employees and make a membership ask. New employee orientations should include the following:

1. Introduce the union and its mission; talk about who the local represents and explain the role of the union in representing members to the employer
2. Talk about the power of collective action; explain key pieces of your collective bargaining agreement; share some specific recent victories and bargaining wins that your local has had over the past few years; talk about how to deal with issues at work (i.e., when to call the association)

3. Highlight opportunities for professional growth through the union (e.g., mentor program and National Board Certification)
4. Make a direct membership ask; send the electronic Membership Enrollment Form to new employees and ask them to complete and return it
5. Ask new employees to complete a Digital New Educator Card in order to:
  - a. Collect personal contact information
  - b. Learn about their interests around professional development, education policy and advocacy and workplace issues
  - c. Create professional development and advocacy opportunities for new members

#### ***Step 4. Follow-up Conversations***

The most important step in any membership recruitment campaign is following up. Potential members often require multiple asks before they agree to join. This is normal; it can be a big decision. However, we must be diligent about following up after we have made a membership ask.

Building representatives are well-placed to engage in follow-up conversations with potential members. These conversations should include the following elements:

- Introduction (if this is the first time meeting)
- Performing a wellness check (e.g., How are you settling into the building/job?)
- Making a union ask (e.g., Membership, organizing, advocacy)
- Performing an assessment (e.g., What is this person's level of support for the union? Are they a potential activist or leader?)

These follow ups should be conducted via phone, text or virtual meeting (e.g., Zoom or Google Meet). Building reps should be provided with contact lists for potential members in their buildings who require follow up.

#### **Step 5. Recording the Data**

Collecting information about potential members is a vital part of the recruitment process. The more we know about a new hire, the better able we are to respond to their needs and frame a successful membership ask. It's important to keep track of certain kinds of information when engaging with potential members, including the following:

- Preferred method of contact and personal contact information
- Issues/concerns (What does this person care about? What changes would they like to see in the workplace)
- Did they commit to taking action? (Did they sign their membership enrollment form? Did they agree to attend an all-members meeting?)
- Do they require a follow up? If so, what date/time/location did they identify for the follow up?

- What is their level of support for the union? Are they a strong supporter, uncommitted or anti-union?
- Are they a potential leader? Is there a role within the local they might be well-suited for?

### **Summary**

Digital member engagement can never replace face-to-face organizing, but it can complement traditional methods if used effectively. During the pandemic, we must make every effort to protect the health and safety of our members, students and the community by limited our in-person contacts whenever possible. In some districts, it may be extremely difficult to access potential members for the purposes of recruitment. For these reasons, digital engagement tools and strategies are our preferred method for conducting membership campaigns this fall. An effective virtual membership campaign includes list acquisition, initial engagement, orientation, follow up and data collection. These practices will continue to serve us well in the post-pandemic future.

## Sample Email Request for New Employee Information

Subject: Union Request for New Hire Information

Body:

Dear \_\_\_\_\_,

The [Local Union] is formally requesting information about new hires entering the [teacher and/or support staff] bargaining unit for the 2020-2021 school year. Please provide us with the following information on new employees hired between April 1, 2020 and the date this request is received.

We are requesting that the data be provided electronically, in Excel format, with the following fields:

- Full Name
- Date of hire
- Title of position
- Work location (school/building)
- Full-time equivalency
- Work email and personal email currently on file
- Home and personal mobile phone numbers currently on file

Due to district health and safety procedures for COVID-19, the [Local Union] will be limited in its ability to engage new hires in-person for the purposes of orientation and recruitment. To protect the health and safety of our teachers, staff and students, we will be making every effort to conduct our Fall 2020 new employee outreach efforts virtually.

In order to facilitate virtual engagement, it is critical that the union have personal email addresses and phone numbers for new hires. Without such information, meaningful access to our bargaining unit members will be restricted due to scheduling changes and limitations on movement within and between school buildings.

Please send this information as a reply all to this email as soon as possible. If you cannot comply with this request, please provide an explanation of the reason you cannot provide such information or the date by which you will provide the requested information

Sincerely,

[Local Union Leader]  
[Local Union Name]

## Sample Email to New Hires

**Subject:** Welcome Message from Your Union!

**Attachments:** CBA; Membership Enrollment Form

Dear \_\_\_\_\_,

Welcome to the \_\_\_\_\_ School District, where you will make a difference in the lives of students every day. The [local union] is driven by dedicated educators, just like you, who advocate for students, the profession, our classrooms, and our community.

With the [Local Union], you are never on your own. When you join us, you are also a member of the 12,000-educator-strong Vermont-NEA and the National Education Association, where 3 million educators across the country share your passion for public education.

As trusted professionals, educators are best equipped to make school and classroom decisions to ensure student success. It's our mission to ensure educators have a seat at the table. As members of the union, we have a powerful voice in creating education policies that enrich the lives of the students. That collective voice is more critical than ever as we prepare for what will likely be an extremely challenging and uncertain school year

The [Local Union] and Vermont-NEA are dedicated to protecting the health and safety of our members, students and the communities we serve. We are in this together and we will get through it together with solidarity and mutual support.

***We would like to invite you to a virtual union orientation on [Date] at [Time].*** During this 1-hour orientation we will get to know one another; discuss the role of the union; review our current collective bargaining agreement (attached) and the benefits, rights and resources available to you as unionized educators. ***Please RSVP by [Date] using this link.***

Finally, if you just joined, welcome to our union! ***If you haven't joined yet, attached is a PDF copy of our Membership Enrollment Form. Please fill it out, sign it and return it to [Treasurer/Membership Contact Name].*** Electronic copies should be emailed to [Email] and paper copies mailed to [Mailing Address].

Sincerely, Jill Doe

First Vice-President for Membership, Anytown Education Association

English, Haller Middle School

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