ASSOCIATION REPRESENTATIVE HANDBOOK

MSEA

EDUCATORS TOGETHER

Our Schools. Our Profession. Our Union.

A sincere thank you to the following staff members for the time and expertise they contributed to the creation of this manual as a resource and guide for this very important role in our union.

Contents

Introduction

At the core of all successful and vibrant unions are spirited people at the ground level who lead the members in their worksite in the work of the union. They organize by building positive, public relationships; constantly identifying and developing more leaders; leading members to take action on what they care about; and advocating overall for healthy and just learning and working environments. These are our Association Representatives (ARs), and this handbook is just for those who have stepped up to this vital role.

We see the work of an AR as constantly evolving and growing. Especially in these times of never-ending attacks on unions and public education, the relationships people have with their union is critical in maintaining our power. ARs are the union's personal connection to each and every member. There is never a time when someone knows everything. There is always more to learn and experience as one works with colleagues and administration, through challenges and opportunities. With that in mind, this manual is arranged in three parts that will guide ARs through the important steps to being effective in a complex environment:

1 **Level 1   Getting Started**   In Level 1, ARs will learn the fundamental steps, the things every AR does no matter their level of experience – building relationships, being a good communicator and being a resource to others in the building. This begins with the basics of building relationships – knowing who the people are and what they care about, and inviting them to be a member. It includes knowing what resources are available – from building rosters to the negotiated agreement, from union leaders to union staff. And, an introduction to the 10 minute meeting as one of the best ways to engage in regular, in-person communication.

2 **Level 2   Building Your Team**   In Level 2, ARs will expand their knowledge and practice to include building mapping, identifying other leaders, problem solving techniques, dos and don'ts, initial advocacy related to the collective bargaining agreement and organizing around interests and issues. Central to being effective in all of these areas is knowing how to have a quality 1-1 organizing conversation with colleagues that develops trust and curiosity, and ultimately will help an AR find the keys to moving someone to action.

3 **Level 3   Maximizing Your Potential**   In Level 3, ARs will find resources to delve deeper into maximizing member involvement and moving people to action; dealing with challenging behaviors; templates for assessing your building, action plans and power analysis; and addressing higher level employment issues. There is also a section on connecting members to larger organizational opportunities – trainings, events, awards, etc. Throughout each section, is the common thread of relationship building, organizing and membership recruitment.

The future of our union is bright—with the energy, dedication and drive of our ARs fueling the way forward. Everything we strive for collectively as a union can be accomplished through organized people power at the grassroots level. Thank you to all the ARs out there for the enthusiasm and leadership you bring to the hundreds of worksites across Maryland. **Solidarity!**

Level One:
Getting Started

1

If you are reading this, you have probably just become an Association Representative (AR) for your local association. You may be feeling excited, apprehensive, or downright unsure of where to start. Don't worry! That's how most people feel at first.

You will learn as you go—everyone does. This document will serve as your guide.

GENERAL THOUGHTS:

- This job can start small and grow as you are ready to do more.
- Lots of people are willing to help you at the local and state level.
- Working with other adults is fun and rewarding (mostly).

TURN THE PAGE AND LET'S GET STARTED!

Who are we?
What do we believe in?

MSEA is the 75,000-member Maryland affiliate of the National Education Association, which represents 3 million education employees across the country. MSEA is the state's largest professional employee organization. Members include elementary and secondary teachers, education support professionals, certificated specialists, school administrators, retired educators, higher education faculty, and students preparing to become members. MSEA supports 38 local affiliated associations throughout Maryland.

Our Purpose

MSEA empowers members to make a positive difference in their professional lives in order to elevate the quality of public education for all students.

Our Organizational Structure

All members belong to a unified structure of membership, which includes the local, state and national associations.

Our Strategic Plan

To achieve our mission, we will grow and strengthen our association to promote public education by:

- Building strong and stable locals to effectively educate, represent, and advocate to be a powerful force for high quality public schools.

- Leading the professions by elevating diverse educator voice on policy, practice, and training to raise the status of public educators and ensure the success of public education.

- Developing and sustaining a culture of organizing that builds power through collective action to recruit, retain, educate, and mobilize members to effectively advocate internally and externally.

1
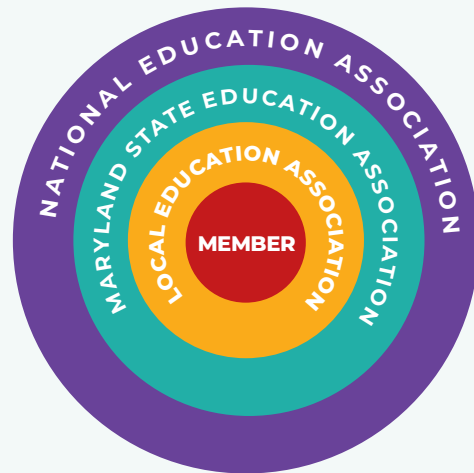
What is an Association Representative (AR)

A Union Leader

The association representative (AR) is a vital union leader and essential to an effective local association. An AR is the main union conduit and organizer at the building and worksite level. As a representative, it is the AR's job to listen to members and to help advocate with them for what they believe in and need to be successful in their work as educators.

As a union leader it is important for the AR to share information to and from the union and to engage members in union activities, both at the building level and within the greater school district community.

An AR is also someone who works to identify and develop other leaders. The AR's role is really multi-faceted—from building relationships with colleagues in the building to helping a colleague with a contract question, to connecting someone to a resource for professional development to working with administration to solve a building-wide concern.

It takes a creative and thoughtful problem- solver and people-person to take on the role of AR. The AR is someone who wants to continually grow and learn more about being a union leader and who wants to channel their knowledge and skills into advocacy and action that will have a positive impact on educators and students.

The Local Association AR Structure

Ideally, each MSEA local affiliate would have an AR structure that includes one AR per 10–15 members in a building or worksite. This manageable ratio allows an AR to build meaningful relationships with individuals, to understand their needs and to offer immediate support, if needed.

We know that face-to-face personal contact is the best possible way to connect with people—to hear their stories and to share MSEA's story. It is also the best way to agitate and compel people to act together for what they believe in and value.

The AR is critical to achieving the goals of the union and making a real difference in the lives of educators. A solid AR structure is something each local should strive for and is the backbone of the larger local, statewide, and national union.

Know Your AR Resources

1 Building-Specific Membership Roster

You need to know who the members are in your building. You can contact your local or state association for a building-specific list. (See next page for sample.)

2 Local and Statewide Leadership and Staff

See Resources

Each local has a president elected by the members and at least one UniServ director, hired by MSEA, to work for your local. Obtaining and using their contact information is crucial to your success. Don't be afraid to ask—they want your questions.

3 Your Local Negotiated Agreement

See Resources

An important job of your local association is to negotiate the salaries, wages, hours, and other working conditions for the employees of the school system. The particulars of these are in your local negotiated agreement or contract.

Your contract will answer many member questions about planning time, salary, meeting requirements, job assignments, and more. Request a copy of that document from your local and keep it available.

Sample Building Roster

Superior Education Association Cedarwood Elementary School									
BIRTHDATE	FIRST NAME	LAST NAME	POSITION NAME	PRIMARY EMAIL ADDRESS	PRIMARY PHONE NUMBER	SEA MEMB TYPE	SEAP01	SUBJECT NAME	NOTES
5/3/78	HEATHER	CARTER	Classroom Teacher	hcarter@acps.org	300-268-6143	AC-1-201		General Subjects	
9/24/88	KEISHA	LEWIS	Classroom Teacher	klewis@acps.org	300-876-1356	AC-1-201			
7/31/82	TYRONE	KELLER	Classroom Teacher	tyrone.keller@gmail.com	300-697-3639	AC-1-201		General Subjects	
3/11/64	JEN	GREEN	Classroom Teacher	greenie@yahoo.com	300-729-8783	AC-1-201			
5/30/71	MICHAEL	HENRY	Custodial Maintenance	mhenry@acps.org	300-722-3506	AC-2-203			
3/4/65	CORINNE	LOPEZ	Classroom Teacher	clopez78@gmail.com	300-289-5278	AC-1-201		General Subjects	
3/17/77	LATICIA	COREY	Classroom Teacher	latcor@yahoo.com	200-979-7735	AC-1-201		Early Child Develop	
3/31/78	DEBRA	TYLER	Classroom Teacher	debbiety88@gmail.com	200-580-6759	PM-1-201			
1/1/55	TINA	DORSEY	Secretarial and Administrative	ljones@acps.org	300-722-0210	AC-2-203			
2/16/87	GRACE	PERRY	Reading Specialist	gperry@acps.org	300-707-2964	AC-1-201			
2/13/59	LENORE	KELLER	Classroom Teacher	lkeller@acps.org	300-338-2941	AC-1-201		Foundations of Technology	
12/5/75	LYNN	SCHAFER	Librarian/ Media Spclist	lschafer@acps.org	200-727-8609	AC-1-201			
2/27/68	MICHELLE	STORM	Classroom Teacher	mstorm92@gmail.com	200-979-8025	AC-1-201		Physical Education	

Does this member contribute to the Political Action Committee (PAC)?

Local / State Member	Membership Type	Code (Dues level)
Example: AC	1	201
AC = Active	1 = Certified	201 = Top Tier
PM = Potential Member	2 = ESP	203 = Middle Tier
		205 = Bottom Tier

TIP

Tips to Using Your Building Roster:

1. Take notes on your roster

2. Verify existing information

3. Ask for personal cell phone and email addresses

The Basics of the Job

1 Communication—give and take information to/from the members in your building

KNOW WHAT YOUR LOCAL IS DOING AND PASS IT ON.
Your local holds meetings for building reps for news and updates. You are responsible for sharing information with the members in your building. These local meetings are critical in connecting the members in your building to the local association and its priorities. It's important to attend them.

PEOPLE ONLY EXPECT YOU TO TRY, BUT THAT DOESN'T MEAN YOU HAVE TO KNOW ALL THE ANSWERS ALL THE TIME.
Every time you are asked a question and find the answer, you learn something new. Gaining new skills and knowledge is part of the process.

WHEN YOU DON'T KNOW, ASK.
Members will come to you for information. Getting them the answers from your president or UniServ director builds trust between you and the member and the member and the association.

2 Build relationships

WITH YOUR MEMBERS
Grab your roster and introduce yourself to every employee in the building, even if it's a small building and you know everyone already. Let them know you're the new AR.
See Appendix

WITH YOUR ADMINISTRATOR(S)
Notify your administrator(s) that you are the AR. We'll talk later about how to speak to an administrator in your role as an AR. You'll find the communication style is different than in your role of educator.

WITH OTHER FACULTY AND REPS
For large buildings, try getting on the faculty meeting agenda and introduce yourself as the AR. Your colleagues need to know you are the AR.

WITH POTENTIAL MEMBERS
Once you have your building roster and after you have introduced yourself to all your members, approach the *potential* members and say hello. Make sure they know if they ever change their mind, you are happy to welcome them into our family of educators.

1

If a potential member asks for help regarding a non-contract issue try something like:
"I'd love to help you with that. By joining, we can assist you and others who are facing that same problem"

MEMBER	BARGAINING UNIT POSITION	POTENTIAL MEMBER
A worker who is eligible and pays full dues to the union.	A worker whose position is represented by the union. This erson may or may not be a member, but is covered by the collective bargaining agreement.	A worker who is not yet paying dues, but is eligible to join because their position is a bargaining unit position.

3 Set-up a communication system

Now that you have introduced yourself to everyone in the building, develop a system to keep people informed.

Personal emails and cell phone numbers are the best ways to communicate and can be collected on your first round of roster visits. If there is data on the roster already, confirm that it is correct and gather any missing information.

Use the information! This could be a monthly email, phone tree for events, or texts to invite people to a 10-minute meeting. Remember that email alone is never enough.

TIP

Having people's personal cell and emails is best done through the affirmative!
"Cindy, I don't have your cell phone on the roster, what is it?"

1.8

4 Create a Bulletin Board for Union News, Activities, and Events

The association recommends that the Association Representatives maintain an association bulletin board at your school for members to access information about the Association. Please check your local negotiated agreement for language on this matter.

Here's a sample of language in the negotiated agreement between the Education Association of Charles County and the Charles County Public Schools:

> ARTICLE 5
> ASSOCIATION RIGHTS
>
> N. The Association will be provided one bulletin board in the staff lounge, mailroom, and/or teacher's workroom of each site for the Association use.

If there is no language in your negotiated agreement pertaining to a bulletin board, this is a good opportunity for you to work collaboratively with your building Administration to get one set up!

Examples of information to include on your Association bulletin board:

- Association representatives names and contact information (pictures of the Reps are great to include)
- President's contact information
- Assigned UniServ director/s contact information
- Association organizational chart
- MSEA banner
- MSEA pamphlet
- Local "Join (local) Now!" pamphlet
- Blank membership application
- Member dues cost
- Upcoming association events
- Notice on where to find the local negotiated agreement online (use your local's website address)

- Other informational flyers from Local/ MSEA/NEA (Some samples are provided in the Resources section of this binder. Your local President and/or UniServ director/s can provide additional flyers from MSEA SharePoint.)
  - PAC information
  - NEA Member Benefits
  - How to Deal with Dangerous Students
  - Prep Tips for First Day
  - Social Media Tips for Educators
  - Workers Comp Basics
  - Email Etiquette
  - ESP: Job Description/ Additional Duties

1

Digging In

NOW THAT YOU KNOW THE BASICS OF THE JOB LET'S TAKE IT A STEP FURTHER

- What to do with new hires and potential members
- How to talk to your administrator
- What issues do people in my building care about
- Running a 10-minute meeting

New hires vs potential members

It's important to note that new hires and potential members are slightly different. New hires are new to the profession (or your school or worksite). Potential members are folks who are not a member yet, but have been in the profession or your school for a while.

New hires

GOALS:

- Introduce yourself and the union
- Assess how much they know about it
- Ask them to join

Potential members

GOALS:

- Introduce yourself and the union
- Assess how much they know and/or why they haven't joined
- Ask them to join

TIP — **Be friendly • Get to know them as a person • Give a specific reason why they should join**

TIP

Ask everyone   Don't assume they haven't joined because they don't want to, they probably haven't been asked

Listen carefully   People will tell you what their hesitancy is for joining if you listen

Sample getting to know you questions to open the conversation:

Introduce yourself

Where are you from?

How long have you been in the profession?

How are you?

What brought you to our county?

Talking to Your Administration

New hires

When you speak to your administration on a union issue, you are not in a subordinate position. You are equals. It is one of the benefits and difficulties of being the AR.

This is a very important relationship that requires balance. Don't burn bridges—act professionally at all times. Keep private information confidential. Defend your member but don't bash administration. You want this to be a productive and professional relationship. Remember the golden rule—you want the administration to treat you and other members with the same professional respect and courtesies.

TIP

Consider establishing that you are not in the subordinate role by calling the administrator by their first name when talking about union issues and Ms/Mrs./Mr. when acting as an employee.

How to:

• Introduce yourself to your administrator in your new role.

• Tell your administrator that your role is to solve problems together.

What success looks like!

You will know this relationship is going well when they come to you first to solve a problem. They might ask you to talk to a teacher/paraprofessional who is constantly late to school, and they don't want to have to write them up. They are trusting you to help solve problems. This is what you want.

What Issues Do People Care About?

When talking to people in your building, issues and interests will come up. Figuring out what issues or interests to engage people around is key.

Here are four questions to consider:

HOW MANY PEOPLE DOES IT AFFECT?

To make a difference, an issue must be felt by most workers and they should agree to a solution(s). Be careful of issues that divide union members. Look for a common issue that everyone is impacted by.

HOW MUCH DO PEOPLE CARE ABOUT IT?

In life, there are a lot of little annoyances that we all would rather not deal with like traffic, these are not the issues we want to organize on. People need to care enough and feel it deeply enough to want to do something about.

TIP

Some grievances make great organizing issues. To determine if it might, ask:
"Is anyone else in this situation?"

IS IT WINNABLE?

Winning isn't everything, but winning over more people will build power in the long run. Consider how much power you already have, what is a win for your group, who is the decision-maker, and what is the cost to win.

DOES IT BUILD THE UNION?

Is this an issue that attracts new people? Does it inspire people to step up and be leaders? Can it involve multiple people? Taking on an issue and winning must build the union or there won't be an organization to take on the next challenge.

10-Minute Meetings, Part 1

Short building meetings are the essential communication link between the union and its members/potential members. Building meetings provide employees with information they need to make decisions related to their involvement with the union. And just as important, building meetings provide the union with information about what concerns workers have on the job.

When organizing around an issue in the building, like insufficient planning time, use 10-minute meetings to focus on the problem. Get folks involved in figuring out and committing to be a part of the solution. Be careful that it doesn't become completely one dimensional so others without that concern don't lose interest. Emphasize that you will stay after the meeting for other issues.

OBJECTIVES OF 10-MINUTE MEETINGS ARE TO:

- Encourage two-way communication between the union and its members
- Seek involvement in the union's effort to resolve the issue
- Share something positive with your members

Sample 10-Minute Meeting Agenda		
Minutes and Topic	**Takeaway**	**Engage**
0-3 minutes: Report what the union is doing	Focus on only the most relevant information—in this case the need to increase planning time.	Ask how they see the problem, how it affects them, and what they think would resolve it. Briefly identify other important issues and let members know you are willing to discuss these after the meeting.
3-9 minutes: Emphasize member involvement in resolving the issue	Have a plan/idea about attacking the planning time issue and ask folks if they will help address it. Sign a petition? Talk to the principal? Etc.	Always offer a way for them to be involved in the solution or resolution. Make it clear that participation is the path to victory.
9-10 minutes: Share something positive with the group	A union success or victory on planning time or another issue that you can somehow relate to planning time—even if it is in another school, local or county.	Ending the meeting with this helps people believe that their involvement and action can make a difference.

SAMPLE AGENDA

ANY TOWN EDUCATION ASSOCIATION
10-MINUTE MEETING

Any Town School - Gymnasium

Month, Day, Year

- What was discussed at the last Any Town Education Association meeting (2 minutes)

- We need your input (on _____). Your views will be presented at the next Executive Board meeting. (4 minutes)

- Latest developments on the problem of _____. (3 minutes)

- Something that should make you proud! (1 minute)

Time's up! We told you that we could do it in 10 minutes! Don't forget to leave your questions and suggestions at the door.

- -

ASK A QUESTION. MAKE A SUGGESTION. Tear off this portion of the agenda and leave it at the door.

Name: _____

Question or Suggestion: _____

_____

_____

_____

_____

_____

_____

10-MINUTE
Any Town Education Association
BUILDING MEETING
Monday, Month, Date, Year

Any Town EA is negotiating our contract this year.

Any Town EA is determined to keep you informed.

Any Town EA leaders need **YOUR** input.

Remember — *Only 10 Minutes!*
We start in the library at 3:15 SHARP!
We end the meeting at 3:25 SHARP!

Honestly, it really is a 10-minute meeting.

If you doubt us, come on Monday and time us!

Checklist for First Year as an Association Representative

☐ Obtain a list of members and a copy of the contract from your local or MSEA.

☐ Introduce yourself to each member in your building and at a faculty meeting.

☐ Attend monthly local association meetings, distribute information and keep members up-to-date.

☐ Establish a regular communication system with the members of your building.

☐ Establish a working/professional relationship with your administration to solve problems in your building and protect your members.

☐ Over time, gain a working knowledge of your contract.

☐ Develop your relationships with administration, members and potential members. Communicate with your association president and UniServ director.

☐ Communicate with potential members and make sure they know they can come to you if they want to join the association.

☐ Create a union bulletin board.

2

Level Two:
Building Your Team

Site Organizing

What is a building map?

A visual tool to support the work of union leaders in the building.

Why should you create a map?

- Ensures that all employees in the building are identified.

- Allows the AR to get to know colleagues.

- Assists with bringing to your awareness the natural groups within the building.

- Encourages multiple leaders in the building to work together and pool their knowledge.

- Makes it easy to spot sections of the building in which union membership is low

- Illustrates the existing networks and helps to begin piecing together your union network at your site.

TIP

Tips on how to implement

- Consider which positions are likely to be natural communication points (front office staff, team leads, department leaders, and related arts staff). This could help identify additional potential leaders.

- Start with a list of all employees in the workplace.

- Think about using your building roster from Level 1, other lists from the union office, a staff listing from the work site, or an emergency phone list.

- Map the physical space to create a frame of reference to find people within the building. This is an especially helpful resource when UniServ staff or the local president visit the building.

- Include entrances, exits, windows, large meeting spaces, restrooms, etc.

- Add the employee references (name, job title, subject area, etc.), using colored markers, highlighting, or colored dots in or near their office or work location.

- Consider using distinct colors to identify union members, union activists, potential members, and supervisors.

- Mark the dots with names for easy reference.

Superior Education Association

Cedarwood Elementary School

Current Members
Potential Members
Potential Members: Former members
⭐ Leaders/Association Representatives
★ New Staff

1st Grade **Heather Carter**	1st Grade **Keisha Lewis**	1st Grade ★ **Tyrone Keller**	1st Grade ⭐ **Jen Green**

Kitchen
Diane Cramer

Cafeteria   ★ **Lisa Lutz**

Penny Berg

Miriam Johnson

5th Grade **Ben Foster**	5th Grade ★ **Lisa Bridges**	5th Grade **Erika Young**	5th Grade ★ **Liz Montag**

Nick Quinn
1st Grade

Corinne Lopez
Kindergarten

★ **Laticia Corey**
Kindergarten

Pam Smith
Kindergartern

Debra Tyler
Kindergarten

Luke Jones
Special Education

Grace Perry
Resource Room

★ **Lenore Keller**
Computer Lab

Restrooms

Locker Room

Gym Office

Locker Room

Gymnasium

★ **Braden Pearson**

Michelle Storm

Storage

Rachel Kowalski
2nd Grade

Julio Rincon
2nd Grade

Sam Nieman
2nd Grade

Willa O'Grady
2nd Grade

Copy Room/Lounge

Susan Sell
Special Education

Mai Chao Yang
3rd Grade

Isaac Rich
3rd Grade

★ **Kim Nguyen**
4th Grade

★ **Wes Turner**
Special Education

Denise Grady
3rd Grade

Yolanda Gutierrez
3rd Grade

Annie Ford
4th Grade

⭐ **Adam Garner**
4th Grade

Nancy King
4th Grade

Restrooms

Georgia Newby   **Lynn Schafer**
Library

Tracy Jeffries   **Kelly Porter** **Tina Dorsey**
Main Office

Maria Gonzalez   **Bob Noble**
Guidance Office
Joan Merry

Val Walters
Nurse's Office

★ **Ronald Leonard**
Custodial Maintenance
⭐ **Michael Henry** **Nina Diaz**

Sample Building Charting/ Mapping Instructions

Getting to the details is important in our work going forward. Where we may have been casual about communication, levels of engagement and relationships in the past, we need to become much more disciplined.

Below are sample instructions for how to map your building or create a meaningful chart of the members in your local by building. You may choose to use a different color coding for your local or building. It is really up to you to decide what would be most useful and the layers of information you want on a map or chart.

Step 1

YOU WILL NEED AN ACCURATE LIST THAT CONTAINS THE FOLLOWING:
Name

Building

Membership status

Subject/Grade taught (this may not be immediately available, ARs should determine this information and add to a spreadsheet in advance of charting.)

Step 2

THERE ARE TWO OPTIONS AT THIS POINT:

- **Using a map of your school building** or worksite, add the names of the people who work in each room/area of the building. Using the color coding below.

- **Chart each building on large chart paper/ Post-its.** Charting the buildings in this manner and posting them up around a room allows for multiple people to interact with the charts, observe patterns, discuss as a group, it also helps people who are very visual.

Step 3

INTERACT AND USE THE MAP

- Make observations about the information and make notes on the chart: Patterns within departments/grade levels, buildings, any significant connections in the community, congregational involvement, other organizations, issues you know are important to someone, etc.

- Make any corrections to lists: Did the person change their name, did they move to a different building, are they doing a different job, etc.

- Rank in terms of support for the union (or some other specific and useful question – likelihood to join, possible AR, possible leader in something short term, etc.):

  1 = Strong Support Already a member and very supportive; may be involved or it is likely that they would in the future

  2 = Lean Yes This person may already be a member or are very likely to join; they are supportive of the union; a follow-up conversation could be pivotal

  3 = Lean No This person may be a member, but not particularly supportive; this person may be a potential member and it is unlikely that they would join; a following conversation could be important

  4 = Anti-Union This person is a not a member and would likely never join

  5 = Anti-Union Leader This person is not a member and actively talks with others about not joining the union; they have a following and can influence others

ARs/leaders should use their best judgment at this point in time about what they know about the person, etc. If they absolutely don't know, then they should not do a ranking for that person.

Then, they need to think about how they will connect with the person – think about the next bullet and the questions listed.

- **Focus on getting to know the people in your building.** Perhaps you can start with one-on-one conversations with newer staff and then move on to other groups of people. To help with the relationship building think about the following:

- **Is there anyone else in your building** you can get to help you reach out to the new folks? Who? When will you ask them?

- **Assign one-on-ones:** Who is talking with each newer staff person? Who knows who? Who does the newer staff person socialize with?

- **How can you hold each other accountable** for the one-on-ones? How many one-on-ones by what date? Break it up by week – how many per week? When will we meet again to discuss what we learned about folks?

- **What are the conversation starters?** Are there activities going on in your local that you can begin the conversation with and ask for the person's perspective on that activity/ issue/interest?

Step 4

CHECK PROGRESS, THINK ABOUT NEXT STEPS.

How can you best act together based on the interests and issues that folks shared during the one-on-one conversations? In what kinds of activities will people participate? What common goals do we all have?

Charting Results

What is a building chart?

- A tool to track vital information at a glance to gauge strengths, weaknesses, and opportunities within your work site.

- Charting is another way of organizing and collecting data about the membership, potential members, and a valuable tool in getting your work site organized.

What are the advantages of a chart?

- If done electronically, in Excel for example, a chart can be updated more frequently to reflect changes in staffing.

- A chart done in Excel would allow you to sort and organize the information you are tracking, depending on your purpose.

- Creating a chart will also allow you to keep diverse types of data for your work site that may help you record membership status, activism information, social networks, attendance at 10-minute meetings, as well as non-school contact information, including personal cell phone numbers and personal emails.

TIP

Tips for implementing a chart

- Make columns that align with the job descriptions, departments, and shifts worked, to enable an analysis of the membership based on these headings.

- Consider a column for leadership positions, extracurricular positions held, and additional information that might be helpful, like civic group involvement.

- Gathering a wide range of information will help you become familiar with your co-workers and assist you in being strategic when asking members in your building to get involved. As you get to know the staff, potential issues they care about will become a part of their conversation.

- Color coding your chart, based on the level of activism in your building, is useful in thinking through how to build a stronger membership within your building/worksite.

2 Building Your Leadership Team

Natural leaders

- Identify co-workers who others look to for guidance, help and support.

- Notice who others respect, admire, and trust

- Observe who responds to questions from their colleagues, shows an understanding of their contract, and notices others who are not present. Individuals who also have a good grasp of the needs within the work place or who can clearly articulate concerns of others are good to get involved at the building level

- Engaging those informal leaders in your work site will begin to create a network that will make site organizing easier.

- Ultimately, natural leaders have a group of colleagues that follow them. Followers will be more likely to participate in an action because of their relationship with that leader.

- Building relationships with these natural leaders will assist you in keeping your work site informed, engaged, and ready to respond when the need arises.

Potential leaders

- Recognizing and identifying leaders is an on-going priority.

- Leadership characteristics to look for include: trustworthiness, honesty, compassion, principled, able to remain calm, and manage their emotions under pressure.

- Individuals who are more interested in wanting to be known as the leader and do not necessarily care about sharing information may not be the best choices. Looking for leaders who can engage others in the work is key in identifying potential leaders.

- Be wary of co-workers who are known as chronic complainers or who are not respected by their colleagues. Individuals who display these characteristics could have a negative impact on your efforts to involve your building in the work of the union.

- Everyone has a place in the goals of the worksite or local as a leader or in another role

- It is important to be strategic by constantly considering who may be a potential leader at your site.

Leadership growth

- Once you have established a network of leaders at your site, continue to grow each person's skills and knowledge.

- As a team, be accountable to each other to ensure that the work gets done.

- Form relationships of trust with your leaders

- Stay in frequent contact and discuss site-based issues to make sure you are all on the same page.

- Encourage learning by sharing articles, newsletters, and other updates to build each leader's capacity.

- Leading democratically, by involving the membership, is the key to building power, strength, and unity at your site. It also keeps the focus on bringing everyone together rather than allowing the leaders to do all the work for the whole.

Members/potential members

- Mapping and charting are ways to identify the membership base in your building.

- Build relationships within your work site in a variety of ways. Socials, breakfast meetings, lunchtime conversations, and even events outside the building help members know one another. This builds solidarity once relationships are formed.

- Create a structure for communication that ensures everyone is informed. Member volunteers, in each department, who can update colleagues that are absent or miss a meeting, are essential to effective communication.

- Develop a mindset that every non-member is a potential member.

- Relationships with all colleagues, including nonmembers, is vital. Until you know your non-members well enough to understand their issues, you will not be successful at recruiting them to be a member.

Connecting member interests to a bigger picture

2

- Using your map and chart will help you know the membership in your building.

- The more you know your colleagues, the more effective you will be at identifying issues and interests in your work place.

- Make use of local, state, and national publications to help your members stay informed about the issues their union is addressing.

- Connecting member interests to organizational priorities is one way to get new activists engaged in the work of the union.

- Every opportunity you take to connect the dots for your colleagues regarding policy decisions, funding, and educational advocacy, the more likely you are to have an informed membership who understands the power dynamic in public education.

2

One-on-One Conversations and Assessments

Effective organizing means building relationships, one at a time, over time, through structured one-on-one conversations.

Organizing conversations are the most effective way to gather information, identify employees concerns and issues, share factual information, inoculate against other campaigns, identify potential leaders, move members to action, and ultimately effect positive change and increase membership.

Purpose of the organizing conversation

- To **develop** a positive, trusting relationship with the other person
- To **identify** concerns and issues
- To **identify** leadership and relationships
- To **assess** employees on a variety of factors and issues
- To **move** to action

INTRODUCE YOURSELF

Introduce yourself as the AR and explain why the conversation is important to you. Tell them briefly about yourself so that they can relate and engage with you on a collegial and professional level.

Ask questions/listen

What does the individual or group of individuals do at work?

What is it like to work there?

What is good about the job and what is not good?

Use the 80/20 or 70/30 rule as a ratio of listening to talking.

Educate

Give factual information to employees on issues, actions, and other relevant information.

Agitate

Why are things the way they are, and who makes these decisions?

How would things improve if you had a voice in making these decisions?

What would it mean to you if we solved this problem? How might we solve it?

Inoculate

Provide clear expectation for likely outcomes and messages that will come from the opposition.

Provide factual and evidence-based refutations.

Don't be afraid to tell the person that you will get back with them if you can't address a concern or answer a question.

Discover connections

Who else should I talk to?

Who do you know that has some good ideas on this issue?

Who has been supporting you through this?

Who do you count on for good advice?

Who do others trust and listen to?

Can you introduce me or help me connect with them?

Invite to action

Ask them to do something.

Assessment (could require another meeting).

TIP

TYPES OF REQUESTS AND INVITATIONS
- Will you enroll as a member?
- Can we schedule appointment for you to talk with co-workers?
- Will you attend a meeting?
- Will you sign a petition?
- Can you serve as an AR?
- Will you engage in a political campaign?
- The possibilities are endless!

End the meeting

Conversations should last 15–20 minutes and no more than 30. Respect their time, thank them for meeting, and for sharing their thoughts and ideas. If you would like another meeting, ask for that.

10-Minute Meetings, Part 2

When a hot concern or problem inspires workers in the building, a before- or after-school meeting is an ideal way to provide focus, direction, and organization to the issue. Use the 10-Minute Meeting format in Level 1 to organize the meeting. The following guides should help with focusing the meeting on a solution to a specific problem.

Before the meeting

Spread the word about the meeting. Let people know what the meeting is specifically addressing. Use email and/or fliers. Encourage those who are very interested in seeing the issue resolved or changed to invite co-workers. Reinforce with them that it requires numbers to make change. Get commitments from people about attending.

Do enough research to clearly identify who can make the change you want around the issue (See Level 3 for ideas on this). Without identifying who can make the change, trying to figure out a solution is impossible.

TIP **Use your building roster to keep track of RSVPs to the meeting!**

During the meeting

Lay out the importance of the issue. Use the individuals who have particular concerns about the issue or problem to speak to its importance. PREP THEM TO BE BRIEF.

Invite the group to express their concerns about the issue. Again, emphasize brevity. You want folks to buy in to the problem and the solution. Ask the group for ideas, but always have a solution to propose, and a plan to implement. Often people will not know who can resolve the problem—it isn't always the school principal.

Your plan for resolution may require several steps. Always think about an escalation of steps. Start with something easy to do—talk with a co-worker and get a commitment. (See Level 3, Moving a Member to Action.) Then move to more difficult commitments.

Make assignments during the meeting, including time commitments. Assign someone to follow up at each step.

Announce the next step and a timeline for it.

TIP Use a laptop and screen, whiteboard, or flip chart to record solution ideas and/or the assignment lists. When people see their ideas or tasks it helps them feel a sense of belonging and relevance to the effort!

After the meeting

Follow up on commitments made. If people are having problems completing tasks, you need to understand why and have a plan to help.

Issue Organizing

Issues are exciting. Issues provide the organization with form and function. In many cases, issues are the driving motivation for participation in the union. Issues are the concrete manifestation of how lives can be changed through collective action.

Identifying issues

Issues can be found anywhere and everywhere -- in the lunchroom, in a staff meeting, or talking with a co-worker in the grocery store. People care about their jobs and want to do them well. Impediments to doing a good job are what organizers call issues.

Issues are grievances, problems, or concerns that workers experience every day. Our job is to figure out how we can use these concerns to build the union. Often they provide a platform for workers' collective voices to be heard and an opportunity to have a say in the workplace.

In his book Nuts and Bolts, Wade Rathke describes the process of listening for issues like "learning to walk with one eye fixed on the ground in front of you and the other eye constantly searching the clouds ahead of you."

The point is that we need to look for immediate, winnable issues without abandoning the bigger, longer term systemic changes that can be won. This takes authentic power and organization.

Gripes v. grievances

Gripes are usually individual concerns or complaints that involve personal preference or tendency. Grievances are legal violations of the negotiated collective bargaining agreement. Sometimes issues are of less relevance to the larger group. Some gripes can be addressed through collective action, but it is important to know the differences. Below are some examples:

GRIPES

- Cafeteria doesn't serve enough vegetarian dishes.
- The principal removes the "casual Friday" dress regulations.
- You are not interviewed for a transfer you requested.
- You don't like the music the principal plays in the office.

GRIEVANCES

- You are asked to attend a meeting during your planning time.
- You are called away during lunch to handle a problem with a student.
- Your check is short a day of pay.
- You receive a bad evaluation for talking too loudly to a colleague.

2

Organizing Issues Checklist

"Issues rise and fall on many grounds, but central to their effectiveness are two overwhelming characteristics: 1) do people care enough about the issue to "vote with their feet" and take the necessary actions to resolve the issue; and 2) does the issue build the organization".

~ Wade Rathke, Nuts and Bolts

A good organizing issue will match most of these criteria and builds on what you reviewed in Level 1:

Organizing issues should:

☐ **RESULT IN REAL IMPROVEMENT AND BE WORTHWHILE.**
Will this specific solution help fix the problem? Will people see a difference? Will people feel good that they are fighting for something that merits the effort?

☐ **BE WIDELY FELT.**
How common is the problem? How many workers face the situation? Many people must feel that this is a real problem and must agree with the solution.

☐ **BE DEEPLY FELT.**
Is this an issue people feel strongly enough about that they will work on it? It is not enough that many people agree about the issue if none feel strongly.

☐ **BE WINNABLE.**
Does the goal seem achievable? Do you know other groups that have won similar issues? How did they do it? Success fosters enthusiasm. Once you have solved the easier issues you may get more help from co-workers to help tackle the more difficult ones in the future.

☐ **BE CONSISTENT WITH LONG-TERM GOALS AND DIRECTION.**
How will this solution lay the groundwork for future related improvements? For example, does it fit with your goals for your next contract campaign?

☐ **BUILD THE UNION AND BUILD LEADERSHIP.**
How will this organizing effort build workers' capacity for future fights? How will the effort strengthen the solidarity, empowerment, and involvement among members?

TIP

Although this checklist describes the basic considerations for selecting issues, it can be more complicated.

SOME CONSIDERATIONS:

- Is there ever a reason to pursue an issue you may lose?
- Is there ever a reason to fight for something that affects a limited number of employees?
- Should the organization refuse to engage on an issue that workers want?

While none of the answers here are simple, attention needs to be paid to these considerations and an organizational structure needs to be in place to make these decisions at all levels.

Getting Results: Problem Solving

It's always best to solve issues at the work site or building level when you can.

Our goal is to get a solution that best serves members and students. Our goal is NOT to hang someone out to dry, or to humiliate or embarrass them.

It's human nature to want to fix something before being exposed or "on the radar" of your boss. Thus, a principal or supervisor is motivated to identify a solution with you before anyone else outside of the building becomes aware of the problem. Plus, when employees are engaged in problem solving, they feel more motivated, they do their jobs better, the school system's performance improves, and every stakeholder wins.

Smart school administrators and supervisors understand this, and will value your contributions and efforts. Those who are less astute, or perhaps undervalue unionism, can usually be brought along through experience to realize that satisfactorily resolving issues at the lowest level is also advantageous for management. It keeps their mistakes local and off the radar of their own superiors. Take advantage of this window for a win-win opportunity, and do everything possible to satisfactorily resolve job-related issues at the lowest level—the work site.

ESTABLISH YOURSELF WITH MANAGEMENT AS THE SITE LEADER AND PRIMARY POINT OF CONTACT FOR EMPLOYEE ISSUES.

1. **Schedule a meeting** with your site administrator or supervisor to establish yourself as a primary point of contact and an ally in lowest level problem solving.

2. **Discuss how you two will work together** in the interests of collaborative site-based problem solving that is win-win.

3. **Prepare an agenda** for your first meeting and consider adding the following topics:

   a. Mutual interests in site-wide success: why a harmonious work site of motivated and satisfied employees benefits all stake-holders, especially students.

   b. Advantages to lowest-level site-based advocacy: why it makes the best sense for all parties to resolve things at the site level (see above).

   c. Expectations for your labor/management partnership, such as the following:

      • Mutual commitment to open and honest communication

      • Pledge to attempt to work things out informally before either party seeks formal action

      • Regular scheduled communications (when, where, format, minimum frequency)

      • Special communications for urgent, evolving, and/or unplanned topics (contact method and timeliness for notifications and responses)

      • Confidentiality (what can be shared, when, and with whom)

      • Documentation and recordkeeping process (personal or shared notes)

ESTABLISH YOURSELF WITH EMPLOYEES AS SITE LEADER/CONTACT.

1. **Use the communication methods** you established in Level 1 to communicate regularly with both members and potential members.

2. **Realistically assess** your availability. Promote the best time and method to contact you.

3. **Reach out regularly** to members to be sure you are the first to hear about concerns and issues.

4. **Be responsive** to communications from staff, management, and your local association.

5. **Report back** to members on issues of importance and concern.

6. **Always maintain confidentiality.** You want to build trust with your colleagues. Knowing that their words are safe with you will encourage employees to share with you.

7. **Always follow through** with your promises to build credibility with your colleagues. It doesn't matter what you say if you don't follow through on promises. Be realistic and honest about your availability and willingness to help. Reach out to your local association or to another association representative if you require additional resources.

8. **Follow up.** Follow up. Follow up.

2

KNOW YOUR LEGAL DUTY TO REPRESENT EMPLOYEES IN ADDRESSING SITE COMPLAINTS.

Of course, you cannot discriminate on the basis of race, color, religion, sex, national origin, disability or age when acting in your capacity as association representative.

The association, and you as an association representative, have a duty to represent every member of the bargaining unit, in a fair, consistent, good-faith, and non-discriminatory manner.

Association leaders and representatives have an obligation to represent all members with absolute fairness and impartiality. Personal beliefs about an individual or the soundness of their complaint are irrelevant. The truth of the complaint will come out in the problem-solving process.

However, the duty of fair representation also applies to potential members if there has been a contract violation. Therefore you must pursue informal solutions at the site level for contract violations impacting any bargaining unit member, whether the complainant is an association member or potential member.

Of course, problems at the site level often negatively impact all employees, not just association members. If you are deciding how to react to a non-contractual complaint from a member of the bargaining unit, who is not an association member, consider the breadth of the complaint: how many other employees are negatively impacted, and what is the overall advantage of a successful remedy to labor harmony? It may best serve your association and your members to seek a solution.

DON'T GET CAUGHT UP IN INTERPERSONAL RELATIONS BETWEEN EMPLOYEES.

School management has the power to obligate; employees have the right to complain and seek relief.

The association seeks relief for employees from conditions imposed by, or not addressed, by some level of management. If an employee has a complaint against another non-management employee, it is management's job to adequately address or resolve it.

IDENTIFY THE BEST PROBLEM-SOLVING METHOD.

Members are entitled to the benefit of the best defense (and remedy) available, and it is your job to be assertive in defending members.

Remember that the association is legally obligated to defend the collective bargaining agreement (CBA) for all members of the bargaining unit, not just for dues-paying members of the association.

To uphold our legal duty to fairly represent everyone in the bargaining unit, and to identify the best problem-solving method, it is extremely important that you are familiar with the language in your contract. Ask your local president or MSEA UniServ director about training or workshops on your CBA. Your assigned UniServ director can answer your questions and may be willing to come to your work site to give a site-based workshop. You can also study the CBA on your own.

TIP

If you are not sure about your duty to represent, or want advice about site level advocacy, always contact your local MSEA UniServ director to talk through the example. You will protect yourself, your members, and your local association!

WHEN A MEMBER APPROACHES YOU WITH AN ISSUE:

1. **Listen carefully** to the complaint, and seek non-judgmental clarification when necessary.

2. **In light of the issues brought to you,** conduct a detailed assessment of your CBA and determine if it is a gripe or a grievance. Remember that more than one article in the collective bargaining agreement may be impacted.

   a. Is there a violation of the collective bargaining agreement ?

   b. Is there a dispute over interpretation of the CBA language?

   c. Is there a violation of a past practice or of a written precedent?

3. **If the answer is "yes"** to any of these questions, then you are dealing with a potential grievance, resulting from a contract violation. The association must address this issue for any person within the bargaining unit, whether they are an association member or not.

   a. Immediately contact your assigned MSEA UniServ director to decide whether or not you should attempt an informal resolution at the site level as opposed to the UniServ director proceeding directly with a formal grievance.

   Whether starting informally or formally, the UniServ director must monitor the grievance procedure and strictly adhere to filing deadlines. Document the information gathered so far and complete any paperwork required by your local association, such as an intake form. Submit everything to the MSEA UniServ director as soon as possible so that you can work together to protect important legal grievance timelines.

b. See the sample association case intake form on the following page. It includes the information to be gathered and shared with the assigned MSEA UniServ director. This is only one example of how to document a case. It illustrates the types of information that should be recorded and shared with the UniServ director. Ask your local if they have a standard intake form for ARs to use.

4. **If the answer is "NO"** to questions a, b, and c, you are likely dealing with a gripe and should pursue a resolution in the best way possible at the site level. Most site-based advocacy is in response to member gripes, since grievances are appropriately handled by an MSEA UniServ director. Addressing gripes is just as important as filing grievances for the morale of the bargaining unit, but we are not obligated to address gripes and other non-contractual issues for non-members.

   a. Confer with your local president or UniServ director for advice and mentoring if you feel that doing so will serve the greater good of the organization.

   b. Explain to the member why it isn't a grievance.

   c. Convey to the member an alternative plan to address their concern.

   d. Approach management with the assumption and premise that resolving the gripe is in the best interests of both labor and management.

Case Intake Form

Case #: _____ **Topic:** _____

This form is for matters that DO NOT involve CRIMINAL accusations.

Contact Information (please print or type)

Name		Job Title	
Member?	☐ Yes ☐ No	Planning/Break Time:	
Job Site		E-mail Address	
Phone (home)		Phone (cell)	
Phone (work)		Work Schedule	
Planning Time		Call at Work?	☐ Yes ☐ No

Important Dates

First Contact Date with Association	
First Employee Knowledge of Event	
Grievance Deadline (20 work days)	
4-205 Deadline (30 calendar days)	
6-202 Deadline (10 calendar days)	

Summary of Issue, Question, or Concern

Contract, Policy, or Regulation References:

Employee Attempts at Resolution (who, what, when, where, results)

Steps to be Taken by Employee

1. Provide copies of related artifacts and communications.
2.
3.

Steps to be Taken by Association

1.
2.
3.

Association Representative(s) Receiving Inquiry and Date Received

Name:	Date:
Name:	Date:
Name:	Date:

EDUCATE AND ORGANIZE THE MEMBERS WITH YOUR SITE TEAM TO ADVANCE SITE SOLUTIONS.

Sometimes concerns rise organically from the staff, sometimes they are identified by management, and sometimes it takes the local association or AR to educate employees about an issue and define the problem.

Problem-solving as a group can bring people together for a common cause and there is strength in numbers.

1. **Seek to understand the work environment,** member needs and interests, and member and management attitudes. Use one-on-one conversations, and the other communication methods successful at your site.

2. **Identify the issues.** Clarify what should be happening and what is happening. The gap between the two is often where the problem lies.

3. **Once you have clearly defined the problem,** identify root causes by observing them as they occur. If you don't understand the root causes of the problem, you will have no way to knowing if you are truly solving the real problem and no way of convincing members that you have.

   a. Be clear about what the problem is from the perspective of the local association and its members.

   b. Remember that management might have different views of what the issues are and consider the variety of potential perspectives.

   c. After issues have been identified, uncover the interests each stakeholder wants to satisfy. Interests will vary with any given solution. Try to anticipate and understand everyone's respective interests.

   d. Separate the list of issues from the various interests stemming from different positions and perspectives.

4. **Formulate proposed solutions** that are realistic and effective and consider the variety of interests and perspectives among employees and those anticipated from management.

   a. This is the time to do some brainstorming. Think outside of the box. Be creative!

   b. Distinguish between the cause and effect. A solution that attacks the root cause will eliminate the complaints/symptoms that the problem causes and that your members reported.

   c. If the root cause has been accurately identified, then removing the proposed solution will lead back to the symptom/complaint again.

ADVOCATE FOR SOLUTIONS WITH YOUR BUILDING OR WORKSITE ADMINISTRATOR/MANAGEMENT.

1. **Request a meeting with site management.** Be honest without showing too many of your cards in advance. Briefly state the nature of the concern and say that you want to "meet to collaborate for solutions" or that you "look forward to working with them for a win-win solution in the best interests of staff and students."

2. **Go prepared.** Have a plan or outline for your meeting, whether or not you share it. Consider the following sequence for the meeting:

   a. Define the problem or challenge (Challenge is a more positive word, depending on the nature of the issues).

   b. Propose possible solutions.

   • This is the time for active listening. Be open-minded, really hear management's interests, and consider in the moment how your proposed solutions may be tweaked to serve mutual labor and management interests.

- Consider new ideas versus one particular solution. Work with management to weigh potential solutions in terms of how each might satisfy everyone's interests.

- Consider whether there is a way to "bundle" a number of options together for a more satisfactory solution that incorporates greater respective interests.

c. Seek consensus on the best solution and associated timelines. Conditions may change, so make contingency agreements about foreseeable future circumstances (for example, if xxx ... then xxx ... .).

d. Restate what you understood to be the agreement reached including action items for all parties, timelines, associated communication with management and members, and how you will work together (ideally) to monitor compliance and evaluate success. Agree to opportunities to test the solutions and to evaluate the agreement as well as its implementation "Let's try it this way for three months and then look at it... ."

e. Document all aspects of the agreement. Don't rely on memory. Write it down as you think through all of the details and implications. Provide a written copy to management so that they have the opportunity to correct, clarify, or confirm.

3. **Test the solution with your site team/members.**

a. Test the solution to ensure that it resolves the complaint. If it solves only part of the problem, then further rounds of collaborative problem-solving may be needed before the situation is totally resolved to your members' satisfaction.

b. Once the situation has been successfully resolved, work with the site administrator/supervisor to try to formally adopt new work standards, with appropriate training and follow-up as necessary to ensure everyone has incorporated the solution. That should reduce the possibility of recurrence.

4. **Communicate success!**

a. Update your members about the successful results and give your local association credit for strength and persistence. Give management credit for collaboration, if appropriate.

b. Educate all bargaining unit employees about any improvements or changes in work standards at your site.

- Talk to non-members about how this success improved their work conditions or otherwise benefited them and ask them to be part of your team.

Dos and Don'ts of Member Advocacy

An introduction to the AR's role when attending a meeting between administration and a member.

OVERALL POINTS:

- **Maintain confidentiality at ALL times.**

- Check with member to see the type of help/assistance they require for the meeting.

- Call local association to speak with leaders and/or UniServ director about the nature of the member's meeting.

- **ALWAYS contact your UniServ director if you think discipline will occur at the meeting.**

- **ALWAYS request a postponement of the meeting if you think discipline will occur (this allows time to contact the UniServ director and have her/him attend the meeting).**

- **OBTAIN** a copy of ALL referenced documents during the meeting.

- Understand you may not gain entry to the meeting.

IF YOU ARE DENIED ENTRY INTO THE MEETING, ADVISE MEMBERS TO:

- Think about her/his/their answer before answering administration questions.

- Talk slowly and clearly.

- Provide answers only to the direct question asked.

- Maintain eye contact with administrator, keep hands on the table, maintain confident body language.

- Feel free to ask the administrator to take a break if becoming uncomfortable or emotional.

- Take detailed notes of the conversation.

- Request the opportunity to provide written statement within 48–72 hours.

- Immediately call the UniServ director for your building to assess the situation and the basis of the denial.

2

IF YOU ARE ADMITTED TO THE MEETING:

- **Take detailed notes**
- Keep tone and emotions under control or neutral. *Note: Standard technique is to intimidate and attack a member. Do your best to diffuse and divert the administrator from this technique.*
- Be respectful and professional at all times.
- Maintain confident and alert body language (eye contact and hands on table)
- Get all the facts from administration so the member knows the charge(s) or issue(s) at hand.
- Ask clarifying questions to clear up any vagueness or ambiguities.

- Your role is to both comfort the member and advocate on their behalf.
- Request permission to withhold oral response by the member and to provide a written response within 48–72 hours.
- Request a postponement of the meeting if emotions are out of control or if discipline may ensue. Note: Administration does not have to comply with your request.
- At a minimum, be a silent observer.
- Offer solutions and advocate for resolution of any outstanding issues.

DON'T:

- Don't refuse to go to a meeting or allow member to refuse to go to a meeting. *NOTE: Member's refusal to attend a meeting could lead to discipline of that member.*
- Don't forget to clarify any vague or ambiguous points.

- Don't give a statement prior to asking to submit one in writing at a later date.
- Don't discuss the details of the meeting with third parties or break confidentiality.

TIP

Try to persuade the administration if they deny your participation in a meeting, by suggesting:

- Your participation will ensure the member understands what is being stated.
- You are there for note-taking purposes.
- You are only there for the comfort of the member.

General types of meetings ARs may encounter

MEMBER INITIATED

Make certain the member has determined what they want as the desired outcome. If necessary, encourage the parties to establish a second meeting or communication if follow up is necessary.

Examples:

- **The negotiated agreement** Example: planning time

- **Clarifying school procedures** Breaking up fights and allowed contact with student as a result

- **Duties** Classroom, bathroom, cafeteria, recess, etc.

- **Follow-up** to student disciplinary referrals

- **Duties** Lunch monitoring, after school, bus duty, etc.

ADMINISTRATOR INITIATED

Always make certain the member knows the nature of the meeting before attending the meeting.

Examples:

- **Administrative investigation** Department of Social Services (DSS), superintendent, or principal

- **Negative observation conferences** Review of administrator notes during observations, scheduling of future observations, and feed-back/comment period

- **Informing member about concern/com-plaint** Parent, student, or peer against member

- **Follow-up to student disciplinary referral** Investigative and fact- finding meeting

TIP

INITIATED BY OTHERS

Get a clear understanding of the purpose of the meeting before commencing. Remember to ask "Is the meeting disciplinary in nature?" or "Can the results lead to discipline?" **If the answer is yes, call your UniServ director.**

Example:

- Responding to investigation *DSS or school investigation? With police or not? Nature and purpose?*

- Member vs. Member *Fact-finding or possible discipline?*

2 ▶ # Checklist for Level 2

☐ Using your building roster and a map of your building, create a visual tool to help with your union organizing.

☐ Identify other leaders in your building to help make connections, communicate, and energize others around actions.

☐ Engage in one-on-one conversations with people in your building to identify issues, interests, and other leaders.

☐ Continue to develop the culture in your building for regular building meetings that communicate, but also move members to action.

☐ As people share issues they care about, assess those issues for the level of impact and potential success using the checklist. Consider whether the issues are gripes or grievances.

☐ Continue to build meaningful, professional relationships with people in your building, including your building principal and worksite supervisors. Maintain regular communication with your UniServ director.

☐ Practice your active problem-solving skills to address issues at the lowest possible level.

☐ Increase your knowledge of the contract and the duty of fair representation.

☐ Continue to establish yourself as a leader in your building.

3

Level Three:
Maximizing Potential

Membership Recruitment

As important as it is to initially recruit members through a membership drive at the start of the school year, it is equally important to continue to recruit potential members throughout the year. This section is designed to assist association representatives in their efforts to recruit potential members and ultimately to build stronger local associations.

What is a member?

A member pays full dues and has full access to professional assistance on non-contractual issues, employment liability insurance for both civil and criminal cases, membership discounts (local, state, and national), legal services, voting privileges, eligibility to be a candidate for elected association positions (local, state, and national), and more.

Potential members are those who are unaware or choose not to join for any number of reasons. Your job is to make potential members aware of the union, its impact on their benefits and contract and other perks of membership, explore and understand their reasons for not joining, and finally, to invite them to join. Once they decide to join, your job is to plug them in.

TIP

TOP 10 REASONS WHY PEOPLE JOIN THEIR UNION
1. Take charge of career
2. Broaden knowledge
3. Professional development
4. Networking
5. Be a leader
6. Become a mentor
7. Make a new friend
8. Give back to the community
9. Strength in numbers
10. Stay inspired and motivated

3 Recruiting members

Before you invite someone to join, you must know why you joined. How you relate to the association is vital. Start with who's who, and end with an ask.

- Review your building roster so that you can identify members and potential members.

- Contact colleagues in person

- Timing is important. People tend to join during important activities like contract negotiations or campaigns, when they are newly hired, when they are helped with a problem and—most importantly—when they are asked!

- Make it personal!

  - Ask relevant open-ended questions

  - Listen to colleague's unique replies and professional needs

  - Connect their concerns with ways the association advocates and supports educators

  - It's okay if you don't know something. Contact your local association office or UniServ director, then follow up with the information your colleague is looking for

  - When talking about dues, talk in the smallest terms. For example: by day, week, month, or paycheck. Compare the daily amount with what that amount will buy in everyday purchases.

- Hand-deliver printed materials. Point out specific information that will interest your colleague. Write a personal note to go along with it.

- If someone shows interest, try to sign them up immediately. Be familiar with the application so you can help. Carry applications with you for those just-in-case moments.

- Remember the basics of closing a deal: **ASK them to join!**

> **TIP**
>
> Sometimes individuals have strong objections to membership. *See Resources for Responding to Objections to Membership. Read this over before you begin your one-on-one conversations.*

> **TIP**
>
> **MEMBERSHIP DOESN'T COST—IT PAYS!**
> When you consider the terrific benefits NEA, MSEA, and your local provide, you have access to some of the best values in goods and services anywhere! Share the NEA Member Benefits page and explore neamb.com with them. See Resources for an NEA Member Benefits flyer.

Recruiting Volunteers for Your Local

It is not unusual for local association leaders to experience frustration when seeking volunteers to step up and help in various ways for the association. The strategies in this section are designed to assist you in your efforts to gain more commitment from members and ultimately to build stronger local associations.

What is a volunteer?

A volunteer is one who performs tasks or participates of their own free will—one whose actions are founded not on any legal obligation but rather on personal choice.

By definition we cannot force people to become volunteers. We must instead determine those factors that motivate people to volunteer. Find out what their "currency" is and then build a recruitment framework around it.

Why people volunteer

Here are some of the primary reasons people choose to volunteer:

1. **People like to be involved** Studies show that it is basic human nature to consciously and subconsciously desire to be a part of activities and events that involve other people.

2. **Issues or causes** Involvement levels increase when individuals are presented with an issue or cause with which they can identify.

3. **Friend or peer influence** Friends and colleagues have substantial influence in motivating individuals to get involved.

4. **Social involvement and reward** Just as some people will get involved because of an issue or cause, others will do it for the social interaction with others. In addition, many people are attracted to volunteer if there are rewards (i.e. recognition, status, etc.).

5. **Pride and ego gratification** Most people take pride in doing something successfully and in belonging to a group that does things successfully. This can be a strong motivating factor in getting people involved.

3

Preparing to recruit volunteers

Success in getting people involved will be greatly enhanced if the association leaders and representatives do advance planning in how to best approach a potential volunteer. This is not meant to be a plan to trap the person, but a plan that will yield the best results.

1. **Form a diverse group of leaders** and members to: (1) brainstorm names of potential volunteers; (2) develop the plan to ask the person.

2. **Identify possible volunteers by** reviewing lists of past leaders (prior ARs, committee members, presidents) and participants in previous association activities. In addition, use this group to generate names of people who might be motivated to get involved if approached correctly. Note: Consider resources that already exist (i.e. local pledge cards, nomination forms, member involvement forms, etc.).

3. **Request association leaders and possibly members,** to nominate people they believe would be good prospects for involvement. Note: This technique should always be used as a part of a total plan. Never use it alone. See sample nomination form.

4. **Use an application form** that would allow the individual to nominate themselves. Make the form interesting and emphasize the importance of the job described. List only specific jobs or activities. Again, this technique should only be used as part of a total plan.

Recruiting volunteers: Be positive. Be prepared. Be sincere.

Personal contact is the only really effective method to use in enlisting volunteers. A personal, one-on-one meeting will generate far more success than a letter, email, or an announcement put in a mailbox. The actual contact needs to be planned in advance.

INCLUDE:

- What the person is being asked to do (be as specific as possible)

- Why this individual is being asked to volunteer

- An approximate amount of time the association is asking the individual to devote to this task

How to keep volunteers

Simply gaining the commitment of volunteers is not enough. The objective should be to keep them active and interested. The leader in charge of the task for which an individual is volunteering is a key factor in accomplishing this. Whether it is the chairperson of a committee or the coordinator of an activity, the leader must be effective.

AN EFFECTIVE LEADER SHOULD:

1. **Develop timetables** and set priorities

2. **Use a planning calendar** and keep records

3. **Present the goal** and allow the group to develop the strategy

4. **Be willing to delegate** and use talent appropriately

5. **Be a prodder to get the job done** and show appreciation often

THE TASKS ASSIGNED TO THE VOLUNTEER AND THE PRIORITIES SET MUST:

1. Be realistic (evaluate time and resources)

2. Be exact and clear

3. Be manageable and understandable

4. Be engaging

VOLUNTEERS NEED:

• Constant reinforcement

• Frequent emphasis on the importance of the job

• Deadlines

• Reminders

• Frequent thank yous

• Good atmosphere where they can have some fun while working

• Good working environment

• Recognition for a job well done

VOLUNTEER RECRUITMENT

DO	DON'T
1. Consider why people volunteer	1. Believe volunteers will call you first
2. Preplan your program	2. Use mail boxes to recruit
3. Use various techniques to identify volunteers	3. Begin until pre-planning is done
4. Use other people to help actually recruit the volunteers	4. Over utilize volunteers
5. Generate ways/incentives to reward volunteers	
6. Say thank you	

Volunteers, dedicated to improving the working conditions of school employees, built our organization. All of us benefit from high involvement and from members who are motivated to achieve association goals. Remember, involvement brings ownership and success. It produces new leaders, increases membership satisfaction and loyalty which can indirectly result in converting new members. It is vital to the continued success of our organization.

TIP

Say: "I believe you are the right person for this position because ... ."
In your conversation, express the reason you believe the individual should want to volunteer (an issue, cause, pride, etc.). Tailor your message to the situation.

For a veteran, say: "As an experienced association member, your value to the organization is very high. Will you...?"

For a rookie, say: "We need new people with new ideas in our organization. No experience is necessary, just your enthusiasm, energy and commitment. Will you ... ?"

Involvement produces new leaders. First, you need to understand the characteristics of a leader and how they are motivated. Use this chart below to help identify leaders. Remember: you want diversity. Different types of leaders help to ensure inclusion.

TYPE OF LEADER	GOALS	CHARACTERISTICS	THINKS ABOUT …	LIKES TASKS WHICH … (HOW TO MOTIVATE)
ACHIEVER	Succeed in situations requiring excellent performance	Concerned with excellence Completely immersed in involvement Competitive, thorough Wants unique accomplishment Innovative Enjoys striving	Doing job better Goals and how to attain them Obstacles and how to remove (innovative, creative)	Allow latitude in setting work pace and work methods Allow for help, feedback and direction from others when necessary Allow them to demonstrate proficiencies and abilities Challenge abilities and skills Allow for clear, unambiguous feedback about performance Gives opportunity to learn new material or skills – trainings/workshops/ professional development
AFFILIATE	Being with someone and enjoying mutual friendship	Concerned with being liked and accepted Seeks warm, friendly relationships Concerned about not being separated from others	Feelings of others and self Consoling and helping people Wanting to be liked	Allow people to interact Require cooperation of co-workers for successful task accomplishments Facilitate group effort in a team
INFLUENCER	Having impact or influence	Strong feeling about having influence in decision making Wants certain idea(s) to predominate Interest in authority, power Often verbally fluent	How to use influence to win arguments, change people, gain authority Improvements in communication	Allow time for personal interaction while working Allow personal control over work pace and work methods Require managerial skills Allow opportunity to direct projects and effect changes
SOCIAL	Pursuit of the general good or public interest	Concerned with idealism, morality, justice Values equality At times judgmental	Standards of the group and the community Evaluation without regard for personal consequences Accountability Image of the Association and profession	Involve meshing association programs with accepted mission and goals Include other groups with identifiable and accepted values Affect generally accepted community concerns
PROUD	Recognition for work performed	Prefers short-term tasks with clear beginning and end Identifies with popular projects Concerned with status	Completing assigned work in a timely fashion Advancement in role Public and PR aspects of activities	Can be completed in a short period of time Are visible Have tangible rewards

Volunteer Nomination Form

The nomination technique can be used to find volunteers for most every position. For a specific job, like finding an association representative for a school, send it only to the member who was nominated or has expressed interest in volunteering.

Consider this to be a pool of data. It should be used when you do not have a specific campaign in progress, but you want to know the skills and interests of your colleagues.

Dear _____:

We need your assistance in identifying people we can recruit for the many important jobs necessary for the functioning of a strong local. Please take a few minutes to complete the nomination form. Include the name of individuals you believe can make a positive contribution to our local. Feel free to nominate yourself!

I believe the following people could make a positive contribution to our association if they became involved:

Name: _____ School/worksite: _____

Contribution to be made: _____

_____

Name: _____ School/worksite: _____

Contribution to be made: _____

_____

Name: _____ School/worksite: _____

Contribution to be made: _____

_____

Name: _____ School/worksite: _____

Contribution to be made: _____

ALL OF US BENEFIT WHEN MORE PEOPLE ARE INVOLVED!

You Name: _____ Date: _____

Cell Phone: _____ School/worksite: _____

Moving a Member to Action

As an association representative, you need to move your members to action. This means that you will need to engage your members on various issues and that requires an organizing conversation. Your success in this type of conversation will help you mobilize members around worksite issues or an important event or campaign.

Here are guidelines to help you have the kind of conversation that will move your members to action. Note: This is not a script, but rather a tool that provides steps you can take for leading members to action.

1 Introduce yourself

- Hi, my name is Sadie and I'm the association rep in our school. Let's talk!

- If someone has recommended you talk with someone, be sure to mention it:
  I was talking with Jessica the other day and she recommended that I also touch base with you because of your interest in _____.

2 Discover the issue

Begin conversations by asking questions to learn what your coworker cares about. Use open-ended questions.

- How's your day going?

- How long have you been in the profession?

- Why did you become an educator?

- What was it like when you first started working in your school?

When moving a member to action around a specific issue, you will want your questions to be more pointed.

- How long have you been asked to work during your lunch break?

TIP

Pointed questions will remind your coworker how they feel about the problem. If you've discussed the issue with them before, ask how the issue is affecting them today.

3 Agitate

Respond to what the member tells you and ask open-ended follow-up questions.

- Do you think that's fair?
- How does that make you feel?
- How long has this been going on?
- What do you think we should do about this?

4 Lay the blame

Ask questions of your colleague to help her or him identify who's responsible.

- Why do you think we are having this problem?
- Who is in a position to fix it?
- Do you think this problem is going to correct itself?

5 Plan it to win it

Now we advance the conversation to a place of hope. This comes in an explanation format coupling power in numbers along with a plan to win. Most of us don't want to lose our negotiated lunch break. Unfortunately, our principal refuses to listen to our individual concerns about this. What if 25 of us sign this petition and we march in to their office together to hand deliver it?

- If we sign this petition and act as a group, don't you think the principal will be more likely to listen?
- By sticking together and signing this petition, we can take an active role in getting our lunch breaks back.

6 Get a specific commitment

Ask your colleague to be a part of the solution by taking a specific action.

- Will you sign this petition and deliver it next Monday with us?
- Will you wear a button next Thursday?
- Will you attend a budget hearing next Wednesday?

Ask your colleague to refer you to anyone else in your school that you should speak with.

- Who else is affected by this problem?
- Will you introduce me?

TIP

Once you get a specific commitment reassure your colleague that you will stay in contact with them.

The day before the action:

- *"Remember to wear your button/come to the meeting tomorrow, etc."*
- *"Thank you for standing together with us."*
- *"How can I keep in touch with you?"*

7 Schedule a follow-up conversation one-on-one

A follow-up one-on-one conversation with your colleague is as important —possibly even more important—than the action itself.

Agree to a time when you and your colleague can discuss the action, its impact, and possible next steps. Remember, you are also working to build a strong sense of solidarity with the members at your school.

A follow-up conversation is instrumental in making this happen and will help to develop new leaders at your school by setting an example for them to follow.

- When and where can we meet to follow up on our action?

- How can we get you more involved?

- What else is happening in our building that I can help with?

Moving a member to action

DOs	DON'Ts
Basic Principles	*Common Mistakes*
• Appeal to: Member's self-interest Personal self-interest Professional self-interest Power self-interest	• Giving a sales pitch and/or giving an interview
• Moral self-interest	• Assuming that the answer will be "no."
• Use active listening	• Not asking open-ended questions
• Be personal, friendly and helpful	• Using emails instead of a face-to-face conversation
• Face-to-face / One-on-one conversations – no email	• Not listening and talking too much (70/30 rule)
• Engage and recruit to activities / actions NOT business meetings	• Not letting the member guide the conversation
• Apathy isn't real (everyone cares about something at work)	• Giving up too soon

3

Actions – moving an issue forward to the desired outcome

Moving a group of people to action to influence a decision-maker can be very effective. Remember to choose actions that are within the comfort zone of your members (it has to be something they will do and have time to do), appropriate for the reaction you are looking for (don't use a blowtorch when all you need is a match), and is fun. Often the best ideas for actions come from the members themselves. Let them think of ideas for actions that would be effective.

INDIVIDUAL, SMALL GROUP, OR BUILDING ACTIONS

Most of these could also be larger union-wide actions

- Post signs in staff lounges/lunch rooms on union bulletin boards
- Wear buttons
- Wear colors (union t-shirts, all black, etc.)
- Wear arm bands
- Worksite and building meetings
- One-on-one meetings
- Leave and arrive at same time in groups
- Resign from voluntary activities
- No representatives at administrative/ student faculty meetings
- Withdraw participation in student vs. faculty games
- Work to rule/contract
- Establish phone trees for quick communication with a set of people

- File a complaint via your school board process regarding health and safety concerns. Next step: contact OSHA/MOSH regarding health and safety violations
- Insist on written communication with administration. Maintain a record of communications
- Letters to parents
- Phone calls to parents
- House meetings
- Individual targeted meetings with parents for one-on-ones
- Petitions

GREATER UNION ACTIONS

Usually promoted by the local or state union for union-wide action

- Attend bargaining sessions
- Candlelight vigils
- Rallies
- Phone banks
- Letter writing campaigns
- Boycotts
- Pack school board meetings
- Work-ins at school board meetings
- Speak at school board meetings
- Encourage parents and community members to speak at board meetings
- Carry signs at school board meetings
- Picketing meetings
- Invite media to union actions
- Contact school board members at home via phone calls, email, letters
- Picket school board members at home
- Boycott school board members' businesses
- Vote of "No Confidence" on superintendent
- Publicize administrators' salaries/increases
- Publicize administrators' junkets and excessive costs
- Members request to review personnel files (in volume)
- Members request personal leave
- Car signs in school parking lots
- Demand financial data from school board

- Flashlights at school board meetings
- Ads in school programs
- Meet with newspaper editorial boards
- Public Service Announcements
- Letters to the editor
- Press releases
- News conference
- Minimum bargaining standards
- Door-to-door leaflets
- Leaflet popular locations
- Coalitions—develop relationships with individuals and other organizations that have similar interests
- Speakers' bureau: develop a list of members who can speak at various events about school issues
- Community newsletters
- Truth booths (booth/table at community events)
- Koffee klatches
- Mass march
- Participate in the community parades

Member-to-Member Networks

One proven structure for encouraging member involvement and strengthening the worksite is building member-to-member networks. The structure is designed to provide needed support for the association/union. This builds on the points mentioned in Levels 1 and 2 about identifying other leaders and building your team.

Building association team (BAT)

OBJECTIVES OF BUILDING ASSOCIATION TEAMS

1. To enlarge and strengthen the communication process more directly with employees through one-on-one conversations.

2. To improve the individual and collective response and action capacity of members to association needs.

3. To promote member involvement in association goals to generate new leaders.

4. To play a supportive role in association activities—by attending association functions, working on legislative issues, or negotiations.

5. To enlist as many people as possible to do the work of the association.

Building communication networks using BAT

1. Start by reviewing the building roster for members in your building.

2. Team members should be different from the AR.

3. Aim for a ratio of 1 BAT leader to 10 members/ potential members. A 1 to 5 ratio is even better if you can identify additional

BAT leaders.

4. Communication is one-on-one.

5. Every member communication should end with a request for a commitment to an association event or activity.

6. Start with activities that are low risk and increase with every new communication.

Consider the following when considering potential BAT leaders:

- **Power players in the building** Members who are respected and influential at your worksite.

- **Experienced past active leaders** Members already have a wealth of knowledge and expertise.

- **Strategically located members** Members who are physically located at the worksite to facilitate timely communication with members.

- **A strong cross-section** of educator-members for others to identify with.

Building strong communication networks

These networks are a simple concept and one of the most important to involve more members in the association.

One-on-one communication networks take time and attention to set up. It will be easier to begin with one small area of your building at a time and replicate from there. Start with an area that is already active and has the most potential for success.

Think carefully about how you can be involved in the creation of the one-on-one networks. The AR should identify people that they feel are likely to become contact people for the BAT network.

Each contact person should be responsible for no more than 5–10 members. Keep it simple and if someone wants to do more, let them. However, do not over use them. It causes burn out and dissatisfaction.

The network needs to be face-to-face and one-on-one. This approach allows people to feel the most comfortable asking questions. Communicating in this way, you and your contacts are more likely to develop a relationship with members/potential members. Communication could include surveys, questions, and other information gathering techniques.

One of the goals of the member-to-member structure is to make the AR's job more manageable. The AR cannot do it all and shouldn't have to. The more people involved in association/union activities, the broader the support will be for the organization. The more face-to-face contact that takes place and the fewer mailboxes we stuff, the more informed and committed our members will be.

Seek out and cultivate relationships with members to include in this network.

As you continue organizing your worksite and growing your volunteer base, use the BAT Organizational Structure as a way to collect more data. The more data you have to begin the process, the better equipped you will be.

TIP

- Identify BAT leaders and ask them to take on this role.
- Divide the members of your worksite into logical units of one BAT leader to 5 to 10 members.
- Create a worksite map or use the one you created in Level 2.
- Revise your one-on-one network yearly depending on current building status.
- Having a network allows you to move forward in engaging members.

3

Sample (BAT) Organizational Structure

Local Association: _____

Association Representative: _____

Building Association Team (BAT): _____

BAT Member _____ BAT Member _____

BAT Member _____ BAT Member _____

BAT Member _____ BAT Member _____

BAT CLUSTER COORDINATOR #1	BAT CLUSTER COORDINATOR #2	BAT CLUSTER COORDINATOR #3
Member's name, cell phone #, and personal email address	Member's name, cell phone #, and personal email address	Member's name, cell phone #, and personal email address
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
6. _____	6. _____	6. _____
7. _____	7. _____	7. _____
8. _____	8. _____	8. _____
9. _____	9. _____	9. _____
10. _____	10. _____	10. _____
BAT CLUSTER COORDINATOR #4	**BAT CLUSTER COORDINATOR #5**	**BAT CLUSTER COORDINATOR #6**
Member's name, cell phone #, and personal email address	Member's name, cell phone #, and personal email address	Member's name, cell phone #, and personal email address
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
6. _____	6. _____	6. _____
7. _____	7. _____	7. _____
8. _____	8. _____	8. _____
9. _____	9. _____	9. _____
10. _____	10. _____	10. _____

Make a copy and return to your local association office.

Action Planning

Successful actions, events, and campaigns take proper planning. When organizing your colleagues around an issue or interest, it's best to lay out the steps, timelines, individual responsibilities, and other details in a plan.

Involving other people in the planning process, and sharing responsibilities for carrying out the plan, is important because it increases their knowledge and skills—and their commitment to the cause. Insist on action planning so that you have the best possible opportunity for success. When a team lacks a solid action plan, the outcome is almost always unsatisfactory— and unsatisfying.

Building an action plan

The highlights of a solid action include details for every aspect of the work to be done.

- What is to be accomplished?
- Who would be involved and need to be considered?
- Who would accomplish what?
- Who would be responsible for each aspect of the plan?
- What are the timelines for each element of the action plan?
- What are the tactics to be used?
- How will you evaluate the success of the elements of your plan?
- How will you evaluate the results of your efforts?
- When will you evaluate the results of your efforts?

SAMPLE ACTION PLAN:

Remember: The action plan should include how and when you will evaluate the results of your efforts.

KEY EVENT	RESPONSIBILITY	TARGET DATE	RESOURCE REQUIREMENTS
Consider: Strategy for each goal, assignment to ARs, what is to be accomplished?	*Consider: Who would be involved, who would be responsible for each aspect?*	*Consider: What are the timelines?*	*Consider: What does the leadership, committee or UD advise?*
> _____ > _____	_____ _____		_____ _____
> _____ > _____	_____ _____		_____ _____
> _____ > _____	_____ _____		_____ _____
> _____ > _____	_____ _____		_____ _____

SAMPLE ACTION PLAN:

WHAT?	WHO?	WHEN?	WHERE?	WHY
Consider: Strategy for each goal, assignment to ARs, what is to be accomplished, what is the evaluation?	*Consider: Who would be involved, who would be responsible for each aspect?*	*Consider: What are the timelines?*	*Consider: where the 'what' is occurring?*	*Consider: the changes to occur or the SWOT Analysis*

SAMPLE FOLLOW-UP SHEET:

ACTIVITY	RESPONSIBLE PERSON	DUE DATE	STATUS	COMMENTS/ ACTIONS

3 Member Involvement

As an association representative and leader, one of the most important jobs you have is to facilitate and promote member involvement. Member involvement strengthens the organization through participation in association/union decision making, programs, and activities. As member engagement grows, so will the capacity of your organization. More members exponentially increases the power of your association.

Your first step will be to form a member-to-member network to inform and engage members at your worksite. Next, you will seek to empower your members to organize and move forward. This won't happen overnight, but stay encouraged and be persistent.

"Every moment is an organizing opportunity, every person a potential activist, every minute a chance to change the world." — *Dolores Huerta*

Basic principles of member engagement

Successful associations achieve unity, strength, and power by organizing and engaging their members. These associations are organized in every worksite to promote association/union values and advocate for their members. In turn, each organized work site empowers its members, who learn new skills in team building and communication, and gain the satisfaction of success though collective action.

The more people you have pulling in the same direction, the more likely your team will win. As an association representative, one of your most important roles is to involve your members and organize them to move in the same direction.

Member engagement/ involving members/ volunteers

ORGANIZING MEMBERS COMES DOWN TO FIVE BASIC ACTIONS:

1. Providing members with the information they need to make personal and professional decisions.

2. Communicating how the association/ union is responding to their needs.

3. Reinforcing that member support is critical to that response.

4. Ensuring that their participation and support is valued and vital to the success.

5. Soliciting member feedback and/or collect data.

SWOT Analysis

Once or twice a year, it's good practice to take a step back from day-to-day AR work for a general analysis of your building.

Analyzing **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats (SWOT) is an important part of strategic planning and decision-making. A SWOT analysis is a simple, but useful, tool for analyzing the strengths and weaknesses, opportunities and threats you see in your building or worksite. It helps you focus on the strengths, minimize threats, and takes the greatest possible advantage of opportunities.

Using SWOT in decision making

SWOT analysis may be used in any decision-making situation when an objective has been defined.

If, for example, the membership numbers are low in your building and you'd like to increase numbers, you would complete the SWOT worksheet from that perspective.

- What strengths do we have that would help us increase membership numbers? Refer back to the building mapping you did in Level 2.

- What weaknesses make it less compelling for my colleagues to become members?

- What opportunities exist either within the association or in the community that might help us improve membership if we were to participate?

- What obstacles or threats exist that often get in the way of our success?

Using SWOT for opportunities

At an opportunity level, use SWOT to plan for the capture of a specific opportunity.

Example: You regularly hear from folks in your building about how dismayed they are with the lack of pay increases. Your association is having a series of townhalls and you think this could be a good opportunity for folks in your building to participate and be heard.

- What strengths do we have that would help us participate in one townhall?

- What weaknesses would prevent us from participating as a building?

- How could this opportunity improve morale,participation, and salary?

- What threats exist that would stop people from participating?

How to use the SWOT analysis

Use the SWOT analysis worksheet to document strengths, weaknesses, opportunities, and threats. Here are some questions that may help as you move through the worksheet.

STRENGTHS

Strengths are internal. When looking at your strengths, think about them both from an internal and member-centered perspective.

- What advantages does your building currently have? Think about resources, people, etc.

- Does your building have an excellent reputation? Why?

- Are you effective as an association in your building in addressing interests and issues?

- What might members see as your strengths?

- If an opportunity presents itself, what strengths would it bring to your organization?

WEAKNESSES

Consider weaknesses from both an internal and member-centered perspective. Do members seem to perceive weaknesses that you don't see? Be realistic and honest with your assessment.

- What weaknesses does your building currently have?

- What could you improve?

- What should you avoid?

- What might members likely see as weaknesses?

OPPORTUNITIES

The external environmental analysis may reveal certain new opportunities for engagement and growth. A useful approach when looking at opportunities is to look at your strengths and ask yourself whether these open up any opportunities.

Alternatively, examine your weaknesses and ask yourself whether you could open up opportunities by eliminating them.

- What good opportunities can you spot in your building, in the school district, in your community, and in your association?

- What interesting trends are you aware of?

- What are relevant changes in social patterns, lifestyle, and demographics, in your building, district, community, and/or association that might improve the strength of your building?

THREATS

Threats can be anything that puts your organization's success at risk. These can be internal and/or external factors.

- What obstacles do you face?

- What new developments or changes have caused your building to stop growing or become complacent?

- What external threats create an unfriendly environment for educators and/or union members?

- Are there any other membership groups vying for access to the educators in your building?

What to do with the SWOT analysis?

After you've done the SWOT analysis, it's a good idea to seek the perspective of others in your building. See if their assessment is the same as yours, and if not, why.

TIP

USE WHAT YOU'VE LEARNED FROM THE SWOT ANALYSIS TO:

- Decide how you will proceed

- Determine what you need to do to make improvements

- Continue to strengthen what is working

3

SWOT Analysis

Assess your building:

STRENGTHS	WEAKNESSES

OPPORTUNITIES (INTERNAL/EXTERNAL)	THREATS (INTERNAL/EXTERNAL)

What are your strengths?

What are your weaknesses?

What conditions or trends exist that may positively impact your building?

What conditions or trends exist that may negatively impact your building?

SWOT Analysis

Sample Assessment: Membership

STRENGTHS	WEAKNESSES
• We have 55% membership in our building. • We have a tight network of support at the grade levels – folks help each other with challenges in the classroom, share ideas, etc. • We come together socially at least once a year. • We welcome new staff at the beginning of the year. • We have two ARs in the building. • We have a union building meeting at least every other month and about 50% of the staff attend. • We had a very good contract settlement this year and a good turnout at county meetings related to funding.	• We have 55% membership in our building. • One of our potential members makes an effort to dissuade new staff from membership. • We've had some difficult community relations over the past few years (parent complaints about curriculum). • About 10% of our membership participate in broader union activities beyond our building.
OPPORTUNITIES (INTERNAL/EXTERNAL)	**THREATS (INTERNAL/EXTERNAL)**
• We have new PTO leadership next school year who are very interested in working together. • It looks like we will have about 15 new staff next year (out of 50 total staff). • Our union is promoting the one-on-one interest cards to help make connections with members and potential members. • One of our members has agreed to be an ambassador of NEA Member Benefits in our building and she's eager to share about those opportunities. • A few members have expressed an interest in learning more about the bargaining process.	• One of our potential members makes an effort to dissuade new staff from membership. • Lots of turnover. The negative attention from parent complaints makes this a building that many new staff leave as soon as they can.

TIP

What are your strengths?

What are your weaknesses?

What conditions or trends exist that may positively impact your building?

What conditions or trends exist that may negatively impact your building?

3

Power Analysis

As a part of goal setting, a group or team must assess how they will accomplish their goal. Identifying decision-makers and influencers is what power analysis allows you to do.

Two steps to power analysis

1. Identify the people or organizations that may have some role, or are a part of the overall equation, of the path for how you will get to your goal.

2. Identify who and what influences the major decision-makers or influencers.

Power analysis

Consider the people or organizations that may have some role or are stakeholders in the issue or interest that is driving your goal:

INNER CIRCLE: Write the names of the people/organizations that are the main decision-makers. These people or organizations must be on your side.

MIDDLE CIRCLE: Write the names of the people/organizations that you would like to have on your side because they influence the inner circle. These are folks engaged in work that is focused on—or otherwise related to—the goal at hand. They are important to include because of an existing relationship, or one you'd like to cultivate.

OUTER CIRCLE: Write the names of the people/organizations that would be nice to have on your side or involved, but who are not imperative to have. These may be partners in other endeavors or other community groups with some level of interest, but only peripherally.

Worksheet #1 :
Power Analysis

Goal: _____
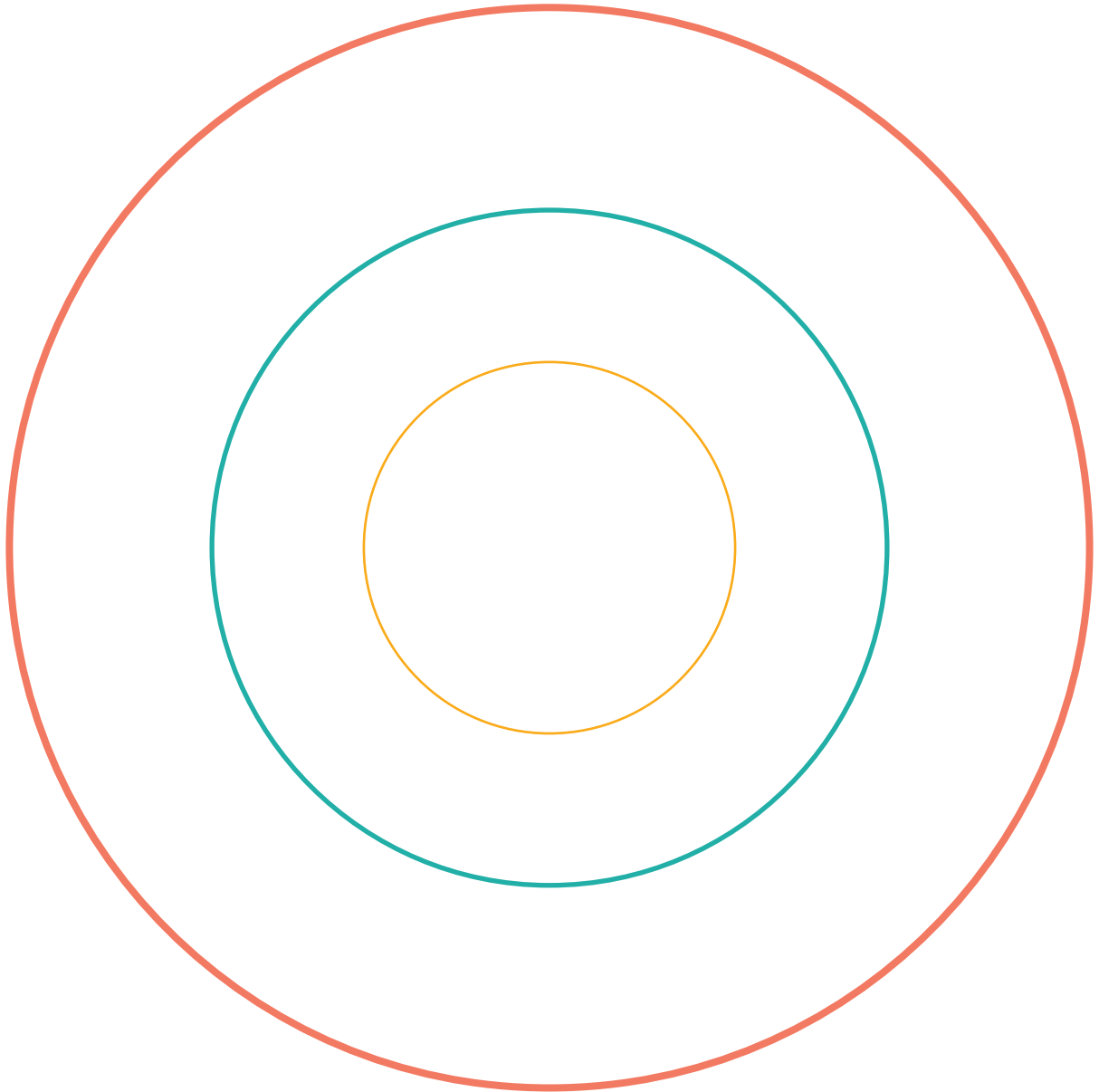
3 ▶ Analyze the inner circle

1. The next step is to analyze your innermost circle more intentionally.
(See Worksheet #2, following page.)

Use the following question prompts for the second worksheet to make this assessment.

- Who influences them?
- Who do they listen to?
- What is important to them? Why?

2. Once this assessment is done, the next set of steps include:

- Who from our association or building is best suited to reach out to these groups or people? Why?
- What is the best approach? (One-on-one conversations!
- What is our timeline?
- How do we involve our fellow members and colleagues?
- What resources do we need (beyond people)?

These questions will help you form a solid action plan. Proper and thoughtful planning increases the likelihood of your success!

Worksheet #2 : Power Analysis

Who are the influencers and minor decision-makers?

What community members or organizations influence these people?

Do we have members with ties to these people or groups?

Which businesses or business owners have particular influence?

Who is the major decision-maker?

Identifying and Addressing Level 3 Issues

By this time, you should be best prepared to identify and address Level 3 issues. These types of issues need a lot of attention and will likely require the work of your UniServ director. You will find that many Level 3 issues, even if being handled by your UniServ director, are great opportunities to organize.

This doesn't mean that you don't have a role in addressing these issues. You have a very important role! Given the severity of these issues, you will be the first point of contact for your member(s). You must work to swiftly address the issues timeliness and deadlines are critical at this level.

It's time to put skills like note-taking, listening, issue identification and more to work!

Contact your UniServ director immediately after speaking with your member(s) about their Level 3 issue and taking extensive notes.

Examples of Level 3 issues:

- Workers' Compensation
- Legal Concerns
- Student Allegations
- Disciplinary Actions with a Loss of Pay

- Child Protective Services
- Safety and Health Issues
- Observations
- Evaluations

TIP

Not all of the examples will be organizing opportunities. For example, student allegations and child protective services are member-specific issues.

But you can think of ways to organize around other Level 3 issues using these prompts:

- Is there a safety issue that is widely felt across your school?
- How can you move your members to action on a safety issue?
- How about a difficult principal who continues to discipline educators in your school?
  - Can you move a petition of no-confidence?
  - March on the boss?
- Is there a student need that is not being met?
  - Can you organize around a possible solution that will address those needs?

Sharpen your pencils and put on your organizing boots. While severe in nature, Level 3 issues can be turned into organizing opportunities!

Strategies to Work with Anyone

In the course of your work as an AR, there is a good chance that you may encounter people in your building who are not supportive of the union and/or have unique characteristics that require some creative thinking on your part to engage with them productively. Here are some examples of how you might engage colleagues, channel their energies, and/or encourage them to think critically about their position.

Anti-union

BEHAVIOR:
Individuals outwardly say that they do not believe in or are hostile towards unions.

ENTERING A CONVERSATION

- Get a conversation going: Ask them what the last thing the union did that they are aware of? What was their opinion of that event or outcome? *Note: If the local hasn't hosted a recent event, connect to a recent MSEA event.*

- Respond to general anti-union pushback: Question the value or values that the individual disagrees with by reviewing the core values of a union. Our core values include:
  – Equity
  – Social justice
  – Equal pay for equal work
  – Equal opportunity
  – Democracy
  – Collective action/solidarity—the power of the union is that all members stand together for the improvement of working conditions.
  – Professionalism

- Respond to pushback on political positions:
  – All decisions of the organization are made by a representation of the membership. Share opportunities for the individual to get involved in the decision-making processes of the organization.

- Respond to: "Educators should not be involved in politics:"
  – The entire education profession has a direct relation to politics. Offer them our one-pager called Why Politics. See Resources.
  – Elected officials on the national, state, and county levels make the decisions. Any time members have the ability to elect individuals to make the decisions, that's politics.
  – Remind them that no dues dollars go to candidates. That occurs through voluntary donations to the Political Action Campaign (PAC). Members oversee the disbursement of the funds.

Apathy

BEHAVIOR:
Members are disengaged with making changes or taking actions that assert individual or collective power.

CONVERSATION STARTERS/ DISCUSSION POINTS

- Get a conversation going: Did you hear about the upcoming rally or other event? Do you know why we are going to the Board of Education meeting next Monday?

- Discover the source of the apathy, which could include
  – Feeling that their involvement, or that of the union, didn't have an impact
  – They expect others to do the work for them
  – They are content with the status quo

- Use positive talking points to counter apathy and focus on how a strong membership empowers everyone.

  The union is owned by the membership. The strength of the union comes from the membership, not the officers or staff.

  Our power is in our collective voice and action. Each member adds to the power of our collective voice through individual action.

  By being involved you have a voice in the changes and direction of the organization.

  Inquire about their interests and link at least one to an opportunity within the existing organization's structure

Change happens when we make it happen— when we cause/influence decision-makers to take the actions we advocate for. That change is often memorialized in contract language, laws, county and/or state board policies, etc.

Reluctant potential member

BEHAVIOR:
The potential member who has chosen not to join or has dropped membership.

CONVERSATION STARTERS/ DISCUSSION POINTS

- Get a conversation going: What do you know about your local?

- Determine the reason why they are a not a member
  - Cost
  - Disagrees with political views/positions
  - Does not know about the organization
  - Doesn't see the real benefit
  - Insecure
  - Overwhelmed
  - Lack of confidence in organization

- Determine their values and link to one of our union values.
  Union core values include:
  - Equity
  - Social justice
  - Equal pay for equal work
  - Equal opportunity
  - Democracy
  - Collective action/solidarity
  - Professionalism

The union's purpose is to advocate for better working conditions for the employee group.

Union dues pay for staff representation and support, a network of resources, and power that is combined by the individual members under the umbrella of the organization.

The union is an organization run by the democratic process. All initiatives, priorities, endorsements, and programs are determined by the membership.

There is power in collective voice. Organizing our collective voice in an effective way takes resources that require funding. Member dues support association efforts to achieve our goals for the benefit of public educators, students, schools, and communities.

Overachiever

BEHAVIOR:
The overachiever is the individual who says "yes" anytime they are asked; they may sometimes take on too much.

CONVERSATION STARTERS/ DISCUSSION POINTS

- Get a conversation going: Thank you so much for agreeing to serve as the chair of the _____ committee. I noticed you are doing a lot. Where do you get your energy?

- Recognize and appreciate their willingness to support the organization.

- The effectiveness of the organization is based on our ability to continue to engage and develop new leaders.

- Instead of trying to do everything, let's prioritize where you should best focus your efforts and bring others along, too.

- You can help the organization by either recruiting new people to do the work or re-evaluate the priorities of the organization.

Checklist for Level 3

☐ Solidify your communications structure by organizing a network of other leaders to communicate with a set group of people in your building.

☐ Hone your skills in membership and volunteer recruitment.

☐ Continue to develop other people in your building by asking them to participate in fun ways that grow their knowledge and skills.

☐ Build upon your learning in Level 2 around one-on-ones by continuing to cultivate the ways you move people to action. Connect with their interests, values, and desire for change.

☐ Consider how you might engage individuals with challenging behaviors, but whose contributions to the association would help build strength and unity.

☐ Delve deeper into addressing issues and taking action by using the Action Plan, SWOT and Power Analysis tools to organize your work and provide vision around the steps and people necessary to achieve the outcomes you want.

☐ Familiarize yourself with opportunities for trainings and engagement at the state and national associations. Think about who in your building might be interested in these opportunities and how you can connect them.

☐ Stay tuned to organizing opportunities sponsored by your local and state and how you can engage colleagues in those activities and efforts.

Resources:
Getting Involved

R

2023-2024 MSEA Officers and Board of Directors

MSEA Officers

Cheryl Bost MSEA President *Baltimore County, cbost@mseanea.org*

Theresa Mitchell Dudley MSEA Vice President *Montgomery County, tdudley@mseanea.org*

Colleen Morris MSEA Treasurer *Howard County, cmorris@mseanea.org*

MSEA Directors

REGION 2
Ivory Smith *Worcester County, ismith@mseanea.org*

REGION 3
Danillya Wilson *Montgomery County, dwilson@mseanea.org*

AT-LARGE DIRECTORS
Ronnie Beard *Frederick County, rbeard@mseanea.org*

Neil Becker *Washington County, nbecker@mseanea.org*

Justin Heid *Frederick County, jheid@mseanea.org*

Veronica Henderson *Baltimore County, vhenderson@mseanea.org*

Felizberto Lazaro *Prince George's County, flazaro@mseanea.org*

Paul Lemle *Howard County, plemle@mseanea.org*

Sean Johnson *MSEA Executive Director, sjohnson@mseanea.org*

NEA Directors for Maryland

Michelle Alexander *Montgomer County, malexander@mseanea.org*

Matt Gresick *Howard County, mgresick@mseanea.org*

Tanya Johnson Martin *Howard County, tmartin@mseanea.org*

Nikki Woodward *Montgomery County, nwoodward@mseanea.org*

Glossary of Terms

Advocate One who supports, promotes, or defends a cause.

Association An organization/union of workers formed to protect the rights and interests of its members. NEA, MSEA, and its local affiliates are an association. We use the word association and union interchangeably.

Association Representative (AR) A local representative of the association. Also known as AR or building representative.

Building Representative A local representative of the association. Also known as association representative or AR.

Bargaining Unit A group of employees represented by a single labor union in collective bargaining and other dealings with management.

Collective Bargaining Agreement A negotiated agreement between an employer and labor union. It includes topics such as wages and working conditions. Also known as Contract, Master Agreement, or Negotiated Agreement.

Educational Support Professionals (ESPs) Classified staff that work within a school system. The positions include, but are not limited to, paraprofessionals, clerical staff, food services, bus drivers, health and student services, custodial staff, and school nurses.

Employee Assistance Program (EAP) A confidential information, support, and referral service, designed to help employees cope with personal problems which negatively affect their lives and workplace productivity. Such programs often provide assistance in the following situations: emotional stress, family disintegration, financial and legal difficulties, alcoholism, drug abuse, and marital disruption. This program is offered at no cost to the employee.

Grievance An alleged violation, misinterpretation, or misapplication of the terms of the negotiated agreement between the Board and the Association.

Harassment Repetitive behavior intended to intimidate, belittle, disturb, or upset.

Member An individual who pays dues into the union, gaining access to all benefits of the local, state, and national unions.

Non—member (potential member) An individual who either pays a fee for the benefits of the negotiated agreement or is not financially vested in the organization by paying dues. This individual is not eligible to access all of the benefits of the local, state, and national unions.

Past Practice A way of dealing with a grievance by considering the manner a similar issue was resolved before the present grievance was filed. Past practice is often used to resolve a grievance when contract language is ambiguous or contradictory, or when the contract doesn't address the matter in dispute. Past practice may also create a basis for a grievance action if the employer unilaterally changes a long standing well understood practice which may be included in the collective bargaining agreement.

R

Power The ability to act. Power can be actual or perceived. Power is the result of what occurs when resources are focused together towards a common goal. For example: our greatest power as a union is our people power. There is power in collective action. The union's ultimate power is the number of members the organization can access and move to action.

Rebuttal A written statement provided by a member that provides additional evidence or contradicts the evidence presented by the school system. They are often used as a response to conference summaries, disciplinary letters, and evaluations.

UniServ An abbreviation for "Unified Service". UniServ is a staff division that supports the local association (Example - ESPBC), state (MSEA), and national (NEA) associations.

Union According to Merriam-Webster Dictionary- An organization/association of workers formed to protect the rights and interests of its members. NEA, MSEA, and its local affiliates are a union. We use the word association and union interchangeably.

Duty of Fair Representation

The duty of fair representation refers to the union's duty to represent all employees covered by a collective bargaining agreement fairly and in good faith, regardless of whether they are a union member or not. To be clear, this duty requires the union to represent all employees as it relates to the provisions covered in the collective bargaining agreement. If a dispute does not arise under the collective bargaining agreement, then there is no duty of representation owed to non-members.

The duty of fair representation stems from state law which provides a union with exclusive bargaining rights. Exclusive bargaining rights are obtained through an election of the employees in a bargaining unit. If a union wins an election, it is the designated exclusive bargaining agent, and therefore, any collective bargaining agreement reached going forward must be negotiated between the union and the employer. With the designation of an exclusive bargaining representative, an employer is precluded from entering into individual agreements with bargaining unit members and from dealing directly with individual bargaining unit members regarding working conditions.

In Maryland, §§6-407, -509 of the Education Article of the Annotated Code of Maryland covers exclusive representation and the duty of fair representation. Specifically, §6-407 defines "fair representation" as:

"An employee organization designated as an exclusive representative shall represent all employees in the unit fairly and without discrimination, whether or not the employees are members of the employee organization."

When enforcing your collective bargaining agreement and representing your coworkers in contractual matters, the statutory duty to do so "fairly and without discrimination" requires the union to avoid any conduct that gives the appearance of arbitrariness, capriciousness, bad faith or dishonesty. Specifically, in carrying out its duty, the union must:

- Act in good faith
- Be sensible, reasoned, and rational in its actions and decisions
- Carry out duties with competence, care, and respect for those affected by actions
- Be thoughtful, attentive, and responsive to those affected by actions
- Take the work of the union seriously

While the duty of fair representation and exclusivity around bargaining are legal requirements, some common and important union values are also served:

- **Democracy—**Citizenship in the workplace
- **Focus on the Common Good—**Concern for humanity, community and the welfare of others
- **Solidarity —**"An injury to one is of concern to all."
- **Advocacy—**Member rights and contractual enforcement
- **Compromise—**Practical problem solving
- **Balance of Power—**Rights and protections that balance management power
- **Dignity of Work—**Quality, pride and respect for all workers
- **Equality—**Equal pay for equal work, universal standards of fairness and an end to favoritism

If you ever have a question about the duty of fair representation, please be in touch with your MSEA UniServ director for a conversation.

Commonly used abbreviations and acronyms

The following are commonly used abbreviations for education associations, agencies, and coalitions throughout Maryland.

MSEA local associations

ACE-AFSCME Association of Classified Employees, AFSCME Local 2250

ACEA Allegany County Education Association

APSASAC Association of Public School Administrators and Supervisors of Allegany County

APSASCCO Carroll County Administrators

CAESS Calvert Association of Educational Support Staff

CASE Carroll Association of School Employees

CCCTA Cecil County Classroom Teachers Association

CCEA Carroll County Education Association

CCEA Caroline County Educators' Association

CEA Calvert Education Association

CESPA Cecil Education Support Personnel Association

DASA – Dorchester Administrators and Supervisors Association

DE Dorchester Educators

EACC Education Association of Charles County

EASMC Education Association of St. Mary's County

ESPBC Education Support Professionals of Baltimore County

FASSE Frederick Association of School Support Employees

FCASA Frederick County Administrators and Supervisors Association

FCTA Frederick County Teachers Association

GASA Garrett Administrators and Supervisors Association

GCEA Garrett County Education Association

HCEA Harford County Education Association

HCEA Howard County Education Association

KCTA Kent County Teachers Association

KCESPA Kent County Educational Support Personnel Association

MCEA Montgomery County Education Association

PGCEA Prince George's County Educators' Association

QACEA Queen Anne's County Education Association

SAAAAC Secretaries and Assistants Association of Anne Arundel County

SEA Somerset Education Association

SMASA St. Mary's Association of Supervisors and Administrators

TAAAC Teachers Association of Anne Arundel County

TABCO Teachers Association of Baltimore County

TCEA Talbot County Education Association

WCEA Wicomico County Education Association

WCTA Washington County Teachers Association

WCTA Worcester County Teachers Association

WCESPA Worcester County Education Support Personnel Association

WCESP Washington County Educational Support Personnel

MSEA

AR Association Representative

CB Collective Bargaining

CBA Collective Bargaining Agreement

CEPP Center for Education Policy and Practice

COA Center for Organizing and Advocacy

ESP Education Support Professionals

HCR Human and Civil Rights Committee

LDC Leadership Development Committee

MAC Minority Affairs Committee

MOC Membership Organizing Committee

MSEA-PAC Renamed the MSEA Fund for Children and Public Education in 1999

NBI New Business Item

NAC Nominations and Credentials Committee

RA Annual MSEA Representative Assembly

RAC Retired Advisory Council

SLC Summer Leadership Conference

State

AIB Accountability and Implementation Board (for Maryland's Blueprint)

MABE Maryland Association of Boards of Education

MACO Maryland Association of Counties

MSDE Maryland State Department of Education

PSTEB Professional Standards Teacher Education Board

National

ASCD Association of Supervision and Curriculum Development

ESSA Every Student Succeeds Act

NBPTS National Board for Professional Teaching Standards

NCATE National Council of Accreditation of Teacher Education

NCSEA National Council of State Education Associations

NCUEA National Council of Urban Education Associations

NEA National Education Association

NEA-PAC Renamed NEA Fund for Children and Public Education in 1999

NEA-R National Education Association-Retired

NFIE National Foundation for the Improvement of Education

NTE National Teachers Examination

Other Education Organizations

AFSCME American Federation of State, County and Municipal Employees

AFT American Federation of Teachers

BTU Baltimore Teachers Union

SEIU Service Employees International Union

General

BOD Board of Directors

BOE Board of Education

DEI Diversity, Equity, and Inclusion

ESOL English for Speakers of Other Languages

ETS Educational Testing Service

HE Higher Education

IPD Instruction and Professional Development

MRSPA Maryland Retired School Personnel Association

MSBE Maryland State Board of Education

MSDE Maryland State Department of Education

PAC Political Action Committee

RSJ Racial and Social Justice

SBOE State Board of Education

Opportunities for Involvement

OPPORTUNITY	TYPE	LEADERSHIP TRAINING	LOCAL OPPORTUNITY	STATE OPPORTUNITY	NATIONAL OPPORTUNITY	PROFESSIONAL DEVELOPMENT	ESP
Bylaws	Committee		X	X	X		
Convention Arrangements	Committee		X				
Early Career Educators	Committee			X			
Fund for Children and Public Education (PAC)	Committee		X	X			
Government Relations	Committee		X				
Human and Civil Rights	Committee		X	X	X		
Instruction and Professional Development (IPD)	Committee		X	X	X		
Leadership Training	Committee		X	X	X		
Legislation	Committee		X	X	X		
Member Organizing	Committee		X	X	X		
Minority Affairs	Committee		X	X	X		
MSEA Community Friend of Education Award	Award			X			
MSEA Community Public Education Advocate Award	Award			X			
MSEA Dorothy Lloyd Women's Rights Award	Award			X			
MSEA ESP of the Year Award	Award			X	X		X
MSEA ESP Professional Development Conference	Event			X		X	X
MSEA IPD Conference	Event			X		X	
MSEA Minority Recognition Award	Award			X			
MSEA Representative Assembly	Event		X	X			
MSEA State Convention	Event	X				X	
MSEA Summer Leadership Conference	Event	X	X	X		X	
NEA ESP Conference	Event	X			X	X	X
NEA ESP Leaders of Tomorrow	Program	X	X	X			X
NEA Representative Assembly	Event		X	X	X		
Nominations and Credentials	Committee		X	X	X		
Resolutions	Committee		X	X	X		
Review Board	Committee		X	X	X		
Women's Concerns	Committee		X	X			

R

Opportunities for State and National Engagement

Awards

MSEA Community Friend of Education Award
This award recognizes a person and/or organization whose leadership, actions and support have contributed to the improvement of public education on a state level.

Application Deadline August 1
Contact Nominations are sent to the MSEA Board of Directors

MSEA Community Public Education Advocate Award This award promotes and celebrates the value of public education to a free and democratic society. Additional information can be found at marylandeducators.org.

Application Deadline September 1
Contact Nominations are sent to the MSEA Board of Directors

MSEA Dorothy Lloyd Women's Rights Award
This award honors up to two individuals, groups, or programs for their accomplishments in the field of girls' and women's rights. Additional information can be found at marylandeducators.org.

Application Deadline November 1
Award Presented Martin Luther King Jr. Celebration
Contact MSEA Women's Concerns Committee Staff Liaison

Human and Civil Rights Award This award honors individuals who promote and defend human and civil rights and serve as role models in the areas of human and civil rights. Additional information can be found at marylandeducators.org.
Application Deadline November 1
Award Presented Martin Luther King Jr. Celebration
Contact MSEA Human and Civil Rights Committee Staff Liaison

MSEA ESP of the Year Award The MSEA Education Support Professional (ESP) of the Year Award recognizes the contributions of ESPs to their schools, communities, and their profession. The award is presented to an ESP member of MSEA who demonstrates outstanding accomplishments and reflects the contributions of ESPs to public education. Additional information can be found at marylandeducators.org.

Application Deadline June 1
Award Presented MSEA Convention
Contact   MSEA ESP State Organizer

MSEA Minority Recognition Award This award offers statewide recognition to minority individuals who have promoted and/or demonstrated leadership in public education. Additional information can be found at marylandeducators.org.

Application Deadline November 1
Award Presented Martin Luther King Jr. Celebration
Contact MSEA Minority Affairs Committee Staff Liaison

Grants

Black Lives Matter at School $1000 grants to support member or affiliate school-based activities that lift young Black and Brown students and work against the systemic school-to-prison pipeline.

Application Deadline October 25
Learn more marylandeducators.org/grants

Human & Civil Rights Grants $1000 human and civil rights grants to support local affiliates and mem-bers with expenses related to pro-grams, services, or activities to promote human and civil rights and social justice.

Application Deadline October 25
Learn more marylandeducators.org/grants

Events

MSEA ESP Professional Development Conference This statewide conference offers a professional development opportunity for ESPs across the state. Professional development is a benefit included in membership dues. Additional information can be found at marylandeducators.org.

Event Held annually on a Saturday
Contact MSEA ESP State Organizer

MSEA Instruction and Professional Development (IPD) Conference This state conference offers full training of popular and high demand topics relevant to professional and union development. Additional information can be found at marylandeducators.org.

Event Held annually on a Saturday
Contact MSEA IPD Committee

MSEA State Convention Workshops The state convention provides professional development opportunities for all of its members from across the state. Additional information can be found at marylandeducators.org.

Event 3rd Friday-Saturday of October

NEA ESP Conference This national conference offers a premier professional development opportunity for ESPs across the nation. Individuals interested in attending may do so as an individual, through local funding, or state funding. Additional information can be found at nea.org/esp.

Event 3rd or 4th weekend of March
Contact NEA ESP Quality Coordinator

NEA ESP Leaders of Tomorrow This program is a three-session training process, held over an eight-month period, that is open to dues paying NEA ESP members, who meet the program's eligibility requirements. Candidates must be nominated for the program and have their application acknowledged and signed by their state Association. Additional information can be found at nea.org/esp.

Application Deadline 1-2 weeks after NEA ESP Conference
Contact NEA ESP Quality Coordinator

MSEA Representative Assembly The annual meeting of MSEA delegates propose, debate and take action on business of MSEA. Delegates may be elected on a local or state level. Additional information can be found at marylandeducators.org.

Event: 3rd Friday-Saturday of October
Contact Local president

Racial Social Justice Summit This is a one-day conference for educators, students, community members, and experts to discuss policies, practices, and ways of being firmly rooted in creating, maintaining, and fiercely protecting just and inclusive educational and community spaces where all members of the Beloved Community feel safe, supported, seen, heard, and valued

Event Held annually on a Saturday
Contact MSEA Equity Organizer

MLK Celebration This event celebrates the life, the work, and the legacy of the Rev. Dr. Martin Luther King, Jr. Through artistic performances, award presentations, and the sharing of MSEA programs and resources, this event highlights our collective racial and social justice efforts and accomplishments across our state.

Event Saturday before Martin Luther King, Jr. Day observance
Contact MSEA Equity Organizer

Minority and Women's Leadership Cohorts The training cohorts focus on power, purpose, and platform through a year-long leadership development program specifically tailored to address the needs and interests of minority and women educators.

Event Three weekends over the course of the school year
Contact Minority Affairs and Women's Concern Committee Staff Liaisons

Early Career Educator Conference MSEA's Early Career Educator Conference is created by and for Maryland's early career education professionals. This event provides a unique opportunity for early educators to network, learn, and share about how to make a positive impact on your students and the profession inside and outside the classroom.

Event Held annually on a Saturday
Contact MSEA Organizational Specialist

Member Involvement Form

MSEA's Member Involvement Form

Visit marylandeducators.org/interestform2022 to complete a Member Involvement Form.

Assignment ☐ Administrator ☐ Education Support Professional ☐ Teacher ☐ Other

MSEA attempts to balance all appointments according to geography, gender, experience and ethnicity. If you would like to indicate your ethnicity, please do so:

☐ American Indian/Alaska Native ☐ Asian/Pacific Islander ☐ African American

☐ Caucasian (not of Hispanic origin) ☐ Hispanic ☐ Other _____

MSEA Committees

MSEA has standing and special committees and task forces that are involved in carrying out the association's mission. As a member of an MSEA Committee, members are reimbursed for expenses while attending committee meetings. This reimbursement includes mileage to and from Annapolis and parking fees. Lunch or dinner are provided by MSEA.

☐ Budget
☐ Bylaws and Rules
☐ Convention Arrangements
☐ Convention Activities
☐ Early Career Educators
☐ Representative Assembly
☐ ESP Organizing
☐ Human and Civil Rights
☐ Instruction and Professional Development

☐ Leadership Training
☐ Legislative and Citizenship
☐ Membership Organizing
☐ Minority Affairs
☐ MSEA Fund for Children and Public Education
☐ Nominations and Credentials
☐ Resolutions
☐ Women's Concerns

MSEA

How We Endorse Our Candidates

Your Local Endorsement Process

1

Non-Partisan Outreach

All candidates invited to complete local association questionnaire on Ed issues.

2

Policy-Focused Analysis

Candidates are interviewed by local members. Recommendations are based on their platform and electability.

3

Member-Driven Vote

Local association decision-making body votes to recommend candidates.

4

Apple Ballot

The recommended candidates earn a place on the local association's official Apple Ballot.

An Even Higher Bar for Statewide Candidates

- MSEA invites all statewide candidates to complete a questionnaire and recorded interview.

- MSEA shares candidate interviews and questionnaires online with members and Representative Assembly (RA) delegates.

- A majority vote of MSEA's Endorsement Council* sends candidate recommendations to the RA.

- Delegates review candidate records, listen to speeches, and vote on the recommendations. A candidate must receive 58% of the delegates' votes for endorsement.

ASK YOUR LOCAL PRESIDENT ABOUT MORE MSEA ONE-PAGERS!

WHAT DO ELECTIONS HAVE TO DO WITH MY JOB AND SCHOOL?

YOUR SALARY
Local Board of Ed, Your Union

YOUR UNION CONTRACT
Local Board of Ed, Your Union

RETIREMENT BENEFITS & PENSIONS
Governor, General Assembly,
Pension System Board

SCHOOL BUDGET
Local Board of Ed, County Officials,
Governor, General Assembly
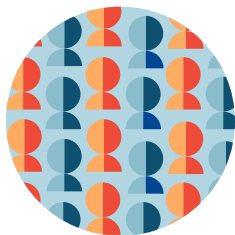
CLASS SIZE
Local Board of Ed

SCHOOL CALENDAR
Local Board of Ed

DUTY-FREE LUNCH
Local Board of Ed,
Your Union

HEALTH/DENTAL INSURANCE
Local Board of Ed, Your Union

EMPLOYEE COLLECTIVE BARGAINING RIGHTS
Local Board of Ed, County Officials,
Governor, General Assembly,
Your Union

DUE PROCESS
Local Board of Ed,
State Board of Ed, Governor,
General Assembly

HEALTH AND SAFETY STANDARDS
Governor, General Assembly,
Congress

WORKERS' COMPENSATION
Governor, General Assembly, Congress

UNEMPLOYMENT COMPENSATION
Governor, General Assembly, Congress

LENGTH OF WORKDAY
Local Board of Ed, Your Union

APPLE ♥ BALLOT
MSEA'S 2022 PRO-PUBLIC EDUCATION VOTER GUIDE

EDUCATOR RECOMMENDED

Need more information? Visit
MDAPPLEBALLOT.COM

MARYLAND STATE
EDUCATION
ASSOCIATION

EDUCATORSTOGETHER

Why Politics?

If you ever wondered why your local association and MSEA are involved in politics locally and statewide, just check out this list.

Your Salary	Local Board of Ed, Union
Your Union Contract	Local Board of Ed, Union
Retirement Benefits and Pensions	Governor, General Assembly, Pension System Board
School Budget	Local Board of Ed, County Officials, Governor, General Assembly
Class Size	Local Board of Ed
School Calendar	Local Board of Ed
Duty-Free Lunch	Local Board of Ed, Union
Length Of Workday	Local Board of Ed, Union
Health/Dental Insurance	Local Board of Ed, Union
Employee Collective Bargaining Rights	Local Board of Ed, County Officials, Governor, General Assembly, Union Union
Due Process	Local Board of Ed, State Board of Ed, Governor, General Assembly
Health And Safety Standards	Governor, General Assembly, Congress
Workers' Compensation	Governor, General Assembly, Congress
Unemployment Compensation	Governor, General Assembly, Congress

MSEA

Exploring Personal Bias
Take a deep breath. This will get personal. That's okay.

MSEA's partnership with the non-profit First Book offers resources to help educators understand and learn how to address the unconscious bias we all carry, plus classroom resources to explore cultures and heighten awareness and tolerance.

These resources follow focus on social-emotional learning and the important, free Trauma Toolkit, the most downloaded resource in the extensive First Book library. The handbook is called "Unconscious Bias: An Educator's Self-Assessment." It's a deep dive every educator should take to discover biases that may affect their work.

The downloadable assessment includes a free, confidential 10-minute online assessment from Project Implicit—a product of researchers from Harvard, the University of Virginia, and the University of Washington. If you join the more than 1 million people (in over 20 countries) who have taken the assessment, you'll likely reveal bias in yourself you may not have noticed or expected.

It's all about awareness, reflection, and intentional exposure to areas that pop up for you. The self-assessment works like this:

1. Discover areas where you may hold an unconscious bias using Project Implicit.

2. Learn how to address your bias by exploring your own personal narrative, or story, that may have informed your bias.

3. Learn how to disarm your bias by looking for more than one way to interpret a situation or interaction.

4. Use the power of books and other media to gain exposure and insight into the lives, experiences, and stories of those against whom you may hold a bias.

Don't miss this free resource and many others at the First Book Marketplace at FirstBook.org. First Book's mission is to provide equal access to quality education for kids in need.

More than 1 million people across 20 countries have taken the Project Implicit assessment to reveal unconscious bias in the following areas:

- **RACE**
- **SKIN TONE**
- **SEXUALITY**
- **GENDER IDENTITY**
- **AGE**
- **GENDER**
- **WEIGHT**
- **NAMES**
- **WEAPONS**
- **POLITICAL VIEWS**
- **DISABILITY**
- **INDIGENOUS PEOPLE**
- **RELIGION**
- **ASIAN**

Reprinted from the February 2019 Issues of MSEA's *ActionLine* magazine.

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A WORD FROM MSEA'S LEGAL TEAM

Family Medical Leave Act:
Coverage, Benefits, Plus New Progress For Esp Coverage

The Family Medical Leave Act (FMLA) provides certain employees with up to 12 weeks of unpaid, job-protected leave per year.

WHO IS ELIGIBLE ?

Employees who have worked for the board of education for at least 12 months and at least 1,250 hours over the past 12 months. A 10-month certificated employee who has worked full-time during the school year will qualify for benefits under FMLA on the first day of work of their second year of employment. This is because the 1,250 hours includes all compensable hours or work, including all time worked outside of the negotiated duty day. (Preparing for instruction would be included in calculating the minimum hour threshold.)

This isn't the case for non-certificated, non-exempt, 10-month employees—education support professionals (ESPs)—of a local board of education. Most ESP don't meet the 1,250 hour threshold requirement, particularly if they work fewer than eight hours per day. Fortunately, a bill has been introduced in the US Senate to address this inequity. The ESP Family Leave Act would update FMLA so that all ESPs who work more than 60% of the total monthly hours expected for their specific role are able to access benefits. This will benefit the almost 3 million ESPs across the country working in public schools.

While we wait for the outcome of the legislation, it is still important to have negotiated FMLA-like benefits within your local association's collective bargaining agreement to ensure the same or similar right to unpaid, job-protected leave for employees.

WHAT IS COVERED?

FMLA provides benefits in any of the following instances:

· For the birth and care of a newborn or an adopted child of an employee;

· To care for an immediate family member (spouse, child, or parent) with a serious health condition; or

· For the employee's own serious health condition.

WHAT ARE THE BENEFITS?

Eligible employees are entitled to 12 work weeks. This leave, in certain circumstances, may be taken intermittently or on a reduced schedule basis. When leave is needed for planned medical treatment, it is expected that the employee will make a reasonable effort to schedule treatment so as not to unduly disrupt school operations.

Under most collective bargaining agreements, employees are required to use accrued paid leave concurrently—such as sick, annual, or personal—to cover some or all of the FMLA leave period. The Department of Labor recently issued an opinion that employers may not delay the designation of FMLA qualifying leave and may not designate more than 12 weeks of leave as FMLA. But this opinion has no legal effect on negotiations or existing language in collectively bargained agreements. In any case, group health insurance benefits must be maintained during FMLA leave.

HOW TO OBTAIN FMLA BENEFITS?

If you are seeking leave for an FMLA-qualifying reason, you don't need to expressly assert FMLA rights or even mention FMLA. If a local board of education is provided sufficient information to reasonably determine that the requested leave is for an FMLA-qualifying event, then the necessary paperwork should be provided to the employee.

?

Questions about FMLA?
Contact your UniServ Director.

ASK YOUR LOCAL PRESIDENT ABOUT MORE MSEA ONE-PAGERS!

Educators on Social Media
Dos & Don'ts

Most of us know by now that social networking sites allow you to create a profile about yourself that you can share with others. Profiles include personal information and interests, plus educational and professional information. Social networking pages, like MSEA's on Facebook (facebook.com/marylandeducators), are also a great tool for multi-way communication and can help people quickly organize around specific issues.

Do …

- **Be aware that users can search for you** by anything in your profile (your employer, university, etc). Control who sees your page. Set your privacy settings so only "friends" can review your information. Stay away from sites that cannot be closed to the public.

- **Monitor comments** that are posted to your page. Delete any with inappropriate language or content.

- **Monitor your friends' Facebook photographs.** If someone "tags" you in an inappropriate photograph, remove the tag and ask that the photo be taken down. On Facebook, disable the Google search function.

- **Use common sense** when you're using social media.

Don't …

- Accept anyone who you do not know as a friend.

- **Post negative information** about your students or school administrators. This includes information that can easily identify a student or administrator.

- **Join groups that may be considered unprofessional** or inappropriate, and leave any such group that you are already a member.

- **Vulgar or obscene language,** materials, photos or links that may be considered inappropriate or unprofessional.

What You Should Know

Employees with tenure rights can be suspended or discharged only if, in a due process hearing, the school district can show misconduct, willful neglect of duty or incompetence. In the context of off-duty conduct, including posting on social networking sites, many courts have required a showing that such conduct has or will likely impact on the employee's ability to perform his/her job in order to uphold employee discipline.

Employees may mistakenly believe that the First Amendment protects their right to post anything they want to on social networking sites. Unfortunately, school employees have limited free speech rights. Specifically, employee speech is not entitled to First Amendment protection:

- If the employee is merely speaking about matters of personal concern, e.g., social activities, partying, personal gripes, etc.; or

- If school officials believe that the employee's speech might disrupt the workplace or interfere with their job performance.

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Professional Email Etiquette

It's a GOOD Thing... A VERY GOOD Thing

Always remember that email communications with parents, colleagues, supervisors, and administrators are a reflection of you and your profession. Emails from your school account should contain only thoughtful professional correspondence. Avoid personal sentiments in your school email signature, including quotes or references to religion or politics.

Be smart, savvy, and safe. One poorly worded email, or ill-advised response, could damage your reputation and your profession.

Follow these 10 simple rules of email etiquette in all of your professional and collegial correspondence:

1. Always show the highest standards of professionalism—Use proper grammar, spelling, and punctuation.

2. Be efficient—Get right to the point and answer questions or concerns in clear and concise language.

3. Protect yourself from the Family Educational Rights and Privacy Act (FERPA) violations—Use only initials, or first name with initial of last name, when referring to a student.

4. Communicate with parents about their child and only their child.

5. Don't use all UPPER CASE, or use different fonts, sizes, and colors—a professional email uses one simple black font.

6. Don't forward emails from anyone that contain potentially libelous, defamatory, offensive, or racist remarks.

7. Don't "Reply All"—If you don't know the other individuals included in the email, or the others don't need to be involved, reply only to the sender.

8. Think before you click "Reply"—Consider a telephone call and have a direct conversation, particularly if the issue is a complex one.

9. In the case of a "serial email-er," seek guidance from your administrator to stop the emails.

10. Do not use email to discuss confidential matters of any kind.

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Can Your Administrator Snoop?

Is Your Workplace Your Own Space?

It's true, as a public school employee you are protected from unreasonable searches of your workplace, but that doesn't mean that anything you leave in plain view on your school-owned desk or file cabinet—or anything saved on your school computer—is off limits to administrators. Administrators can inspect school-owned property at their discretion, and have done just that, including searching computers for emails and other information.

And that's not the only thing. While the purse, messenger bag, or briefcase that you bring to your classroom or worksite is considered private property when you are at work, the administration can search them if there's reasonable suspicion that there's an item inside that violates the law or school policy.

!

Bottom Line?

Be aware... don't store personal items in a school-issued desk or file cabinet. And maybe most important, never use your school-issued computer for personal emails—wait until you get home.

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ASK YOUR LOCAL PRESIDENT ABOUT MORE MSEA ONE-PAGERS!

"It's the internet, don't think you can post anything anonymously!"

KRISTY ANDERSON | MSEA Chief Counsel

Employees may mistakenly believe that the First Amendment protects their right to post anything they want on social networking sites. Unfortunately, school employees have limited free speech rights—employee speech is not entitled to First Amendment protection. Save these tips and share them with colleagues. **Keep you and your job safe!**

15 Tips from MSEA's Legal Team

1. Set strict privacy settings so that only your friends can see your photos and posts.

2. Be cautious about those you accept or invite as friends on social networks.

3. Do not friend or share posts with students or their parents.

4. Limit the amount of personal information you share.

5. Create a separate account if you are using social media for educational purposes or classroom lessons.

6. Keep your professional and personal lives separate.

7. Do not post on personal networking sites during work hours.

8. Do not use a school computer to post. Rules may be more restrictive when educators are using district-issued computers or the post is transmitted using the district's server. Even posts made on privately-owned devices like your smartphones using the school's wi-fi connection can be traced.

9. Don't post negative or offensive comments about your job, your administrator, your school, or your students or their families.

10. Check your social media profile and delete any inappropriate or questionable images, status updates, or communication dealing with alcohol, explicit sexual matters, violence, or vulgar language.

11. Do not send confidential information through social networks.

12. Always be skeptical and cautious.

13. Only post information that you are comfortable with anyone seeing.

14. Do not post anything that could be considered harassing, discriminatory, or malicious.

15. Respect copyright and other intellectual property laws.

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You Deserve a Safe Work Place

What is a student assault?

It is the threat of physical harm combined with the present apparent ability to carry out that threat. The threat has to create a fear of imminent harm or result in offensive contact. An assault is an intent crime—a student under the age of seven, or a student lacking the mental capacity to form such an intent, will probably not be prosecuted for an assault.

If assaults are something that occur in your school, you have options. Let's take a look:

Document the event.
Your report must include a detailed description, plus the date, time, and location of the incident. Most importantly, your documentation must include witnesses.

Report physical injury.
If you sustain physical injuries, complete the first report of injury form and submit it to the appropriate administrator at your school.

See your doctor immediately!

Contact your local UniServ director.

File for workers' compensation benefits.
Don't rely on the school system to do it for you!

Use assault leave benefits.
If you miss work due to injuries, your UniServ director can help you access assault leave benefits instead of sick days.

File criminal charges.
This may be for documentation purposes only, but the act of filing informs parents or guardians and places the school system on notice. In some counties filing charges is necessary to qualify for assault leave benefits. Above all, if you are the victim of a student assault, contact your local association for advice and guidance.

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MSEA

EDUCATORS TOGETHER
Our Schools. Our Profession. Our Union.

MSEA is the 75,000-member Maryland affiliate of the National Education Association, which represents 3 million education employees across the country. MSEA is the state's largest professional employee organization. Members include elementary and secondary teachers, education support professionals, certificated specialists, school administrators, retired educators, higher education faculty, and students preparing to become members. MSEA supports 39 local affiliated associations throughout Maryland.