Super Majority Membership

Plan to Increase Union Membership

Use this worksheet to make a union-wide or site specific plan.

Goal for (year_____): _____

By how much do you want to increase membership this year? (# or %)

Area	Activities	Who is responsible?	Timeline
Keep accurate member data list (i.e. An updated list of all bargaining unit members by site/department noting who is and who isn't a full member of the union)			
Conduct an annual membership drive that includes 1:1 personal outreach			
Outreach to New Employees			
Outreach to Long-Standing Bargaining Unit Members			
Incorporate Membership Recruitment into Back-to-School Events			

Union *Summer* School
Education & Training Department   9

California Federation
of Teachers
AFT, AFL-CIO
A Union of Professionals

Area	Activities	Who is responsible?	Timeline
Incorporate Membership Recruitment into Regular Meetings & Events			
Incorporate Membership Recruitment Into Print & Electronic Communication			
Other			
Other			

Union *Summer* Schoo**l**
Education & Training Department

10

California Federation
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SAMPLE Planning Checklist: Member-To-Member Outreach Drive

✔	**Activity.** *This SAMPLE provides one example of how the areas of work might be divided among the team.*	**Done By When**	**Who**
☐	**Discuss member-to-member outreach with local union leadership.** • Make sure this is a central topic on an Executive Board agenda. • Foster dialogue about the connection between member outreach, member participation, and our ability to win improvements for our members, students, and communities.		President
☐	**Identify Local Point Person & Set dates, times, place, and unit focus.** • Give yourself at least **2-3 months of planning time**. • Set the days and times that you will be conducting outreach. Decide where you will reach out to members (e.g. at the worksite, at the end of a class or office hours, house-visits, etc.). Choose which sites, departments, campuses, and/or job classifications you will focus on first. • Make sure one person from the local is assigned to serve as the overall coordinator of the project.		Executive Board
☐	**Develop a budget.** • A budget reflects an organization's priorities. Make sure to allocate resources for this project. • Common expenses include things like printing, release time, food, travel, lodging, and supplies.		Drive Point Person
☐	**Clean database to produce complete, accurate, and usable lists.** • Note membership status, COPE membership and contribution level. Include things like role in the union, shift, teaching time and place, campus, school site, departments, and office numbers. • Consider barcoding the list, especially if you have a large bargaining unit. • Make sure to have enough members to visit on the lists in each packet so that volunteers' time is well utilized.		Admin staff or Database volunteer
☐	**Develop a message and materials.** • Write a sample 1-page conversation *script* (sometimes called a 'rap') that connects with your members' values and the issues they care about. • Design a 1-2 page *leaflet* that highlights recent union wins, provides information on contemporary issues, and invites people to an upcoming union meeting or event. This leaflet is sometimes called a 'leave behind' because you leave it with the members you talk to. It should connect with the message on the script. • Make sure to have the *forms* you need like membership forms, COPE contribution forms, surveys, or other things you are asking people to complete. • Develop a *contact sheet* so you can remember important details about the conversations you have and to assess support. • You will need all of these materials collated into packets for the volunteer training and the outreach drive itself. • Contact CFT for sample materials.		Drive Point Person with input from the team.
☐	**Recruit volunteers.** • Ask Union Officers, Executive Board Members, & Site Reps/Stewards to participate. • Ask individuals who have been active in the union or who would like to be more involved. • Recruit volunteers with a personal 1:1 ask; not just a general call for volunteers at a meeting.		Drive Point Person with assistance from Executive Board Members.
☐	**Arrange release time.** • Arrange union release time well in advance for members who are coordinating or are playing a significant role in the outreach drive.		President

✓	**Activity.** *This SAMPLE provides one example of how the areas of work might be divided among the team.*	Done By When	Who
☐	**Train volunteers.** • Set training date, time, and location. 2 hours, plus 30 minutes for food/refreshments. • Contact CFT for assistance in volunteer training. • Plan curriculum and include the materials for the drive. • Pick a time that works best for your volunteers. The night before kick-off is often a good time. • Make sure to do reminder calls to volunteers prior to the training.		Drive Point Person with CFT assistance
☐	**Establish a reporting structure and team accountability.** • The most successful outreach drives are very structured with detailed responsibilities and reporting structures. Mutual accountability to the plan leads to success. • One person should be assigned as the point person to lead the team and coordinate the overall effort – the same person identified as the Local Point Person. • During the planning process, establish clear responsibilities and set a time for the team to regularly meet for a progress check-in. • For the actual drive, determine where volunteers will meet for dispatch, when you want volunteers to check in, and how results will be tracked.		Drive Point Person
☐	**Assemble packets.** • Gather supplies like file folders, two pocket folders, pens, highlighters, etc. File folders are great for the packets. • Print out a list for each volunteer packet. • Assemble a packet for each volunteer that has a list, script, forms, leave-behind leaflet, contact sheet, and a campus/building map.		Admin Staff or Drive Point Person with help from the team
☐	**Kickoff the outreach drive.** • Make reminder calls to volunteers 1-2 days prior to the drive. • Set up dispatch location with refreshments, volunteer cell phone list, sign-in sheet, packets, pens and other supplies you will need. For college campuses you might want to consider a table as the dispatch location that will also add to visibility of the drive. • Make sure that someone is always stationed at the dispatch location to greet and orient volunteers and to debrief with volunteers when they return. The coordinator should also call volunteers mid-day to check in on how things are going. • Make sure to have a place you can make photocopies of last minute materials. • When volunteers return ask them to summarize how many people they talked to, how many sign-ups, and other important aspects of their conversations. Make sure they turn in their contact forms.		Drive Point Person
☐	**Complete post-drive details.** • Make sure to have a plan of how data entry will happen and who will do it. • Process the forms from the drive (membership forms, surveys, COPE or other) • Send a welcome or thank you email to the contacts you made during the drive. • Have a plan to follow-up on the individual questions or opportunities that are identified during conversations with members.		Drive Point Person with help from team
☐	**Celebrate success!** • Thank volunteers. • Report quantitative and qualitative results to the Executive Board. Discuss outcomes and plan next activities for member-to-member outreach. • Add Member Organizing as a standing agenda item for union Executive Board meetings.		President and Drive Point Person

My Membership Recruitment List   Union Leader Name: _____

Goal

By ___(date)___ I will talk to ___x#___ Agency Fee Payers with a goal of signing up ___x#___ new members in my work area.

	Agency Fee Payer Name	Department/Subject	FT/PT?	NON-Work Email	Cell Phone	Joined the Union? (Y/N)	✓Contact Sheet Completed
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							

Tally

Number of Contacts – (How many people did you talk to and ask to join the union?): _____

Number of New Members – (How many people signed a union membership form?) _____