



*A Union of Professionals*

**AFT LEAD**

Leadership Education and Development

> **AFT NATIONAL**

# Member Engagement Training Manual

#aftALLin

**A Manual for Member Organizers  
and Activists**

*July 2016*



Randi Weingarten

PRESIDENT

Lorretta Johnson

SECRETARY-TREASURER

Mary Cathryn Ricker

EXECUTIVE VICE PRESIDENT

### **AFT Executive Council**

J. Philippe Abraham

Shelvy Y. Abrams

Barbara Bowen

Vicky Rae Byrd

Christine Campbell

Zeph Capo

Alex Caputo-Pearl

Donald Carlisto

Larry J. Carter, Jr.

Kathy A. Chavez

Melissa Cropper

Evelyn DeJesus

Aida Diaz Rivera

Jolene T. DiBrango

Marietta A. English

Eric Feaver

Francis J. Flynn

David Gray

Anthony M. Harmon

David Hecker

Jan Hochadel

Fedrick C. Ingram

Jerry T. Jordan

Ted Kirsch

Frederick E. Kowal

Louis Malfaro

Terrence Martin

Joanne M. McCall

John McDonald

Daniel J. Montgomery

Michael Mulgrew

Candice Owley

Andrew Pallotta

Joshua Pechthalt

Paul Pecorale

David J. Quolke

Jesse Sharkey

Denise Specht

Wayne Spence

Tim Stoelb

Jessica J. Tang

Ann Twomey

Adam Urbanski

### **Our Mission**

The **American Federation of Teachers** is a union of professionals that champions fairness; democracy; economic opportunity; and high-quality public education, healthcare and public services for our students, their families and our communities. We are committed to advancing these principles through community engagement, organizing, collective bargaining and political activism, and especially through the work our members do.

Copyright © American Federation of Teachers, AFL-CIO (AFT 2017). Permission is hereby granted to AFT state and local affiliates to reproduce and distribute copies of the work for nonprofit educational purposes, provided that copies are distributed at or below cost, and that the author, source, and copyright notice are included on each copy. Any distribution of such materials to third parties who are outside of the AFT or its affiliates is prohibited without first receiving the express written permission of the AFT.

# Table of Contents

---

## **1. Why We Are Doing This**

- Introduction How to Use This Manual

## **2. One-on-One Conversations**

- Instructor Notes
- Handouts

## **3. Tracking Our Progress**

- Instructor Notes
- Handouts

## **4. Lists, Maps and Charts**

- Instructor Notes
- Handouts

## **5. The Work-Site Structure**

- Instructor Notes
- Handouts

Appendix 1: Member Engagement Tools

Appendix 2: Mobile Toolkit Training Guide

Appendix 3: Agency Fee Conversation Guide

Appendix 4: Community Engagement Tools

Appendix 5: Community Schools

Appendix 6: Campaign 2016



# Why We Are Doing This

---

## INSTRUCTOR NOTES

The fight we are in is rooted in power—who has it, who won't give it up, who's willing to share it, how do we gain or reclaim it. We're under assault, and we've been doing an amazing job by speaking out, fighting back, and fighting forward.

But our movement is at a crossroads. The other side wants to kill us. They don't care about the people who do the work. It's not personal. It's totally about power. They know that there is a finite amount of power and they don't want to share their power with anyone else—especially unions. So they attempt to marginalize, demoralize and de-professionalize us.

We have to build our power through member engagement to keep our unions strong. A union isn't just the president or the E-board and they can't do the work by themselves. Every general needs a good Army. And our Army is made up of our members.

The purpose of our member engagement and mobilization training is to develop a process that connects our members to their union and moves them to activism. This manual is designed to:

1. Build strong worksite structures that build lasting relationships that will support engaging and mobilizing our membership around issues they care about.
2. Provide member organizers the tools they need to have a conversation with their colleagues, listen to their concerns and share information that comes from these conversations with union leadership.

## How to Use This Manual

This member engagement and mobilization training manual for member organizers and activists is the AFT's guide for internal organizing throughout the union. It provides a practical approach for establishing a union that is of, rather than simply for, members. The training materials that follow build on the experience of many AFT leaders, staff and activists. It is intended to be used by campaign directors, affiliate leaders, organizers and work-site leaders.

This curriculum is meant to be enhanced with local or campaign-specific information, so it will be more beneficial to you in engaging and mobilizing local activists and members.

We have included appendix materials to conduct training for fair share and political conversations. Feel free to adapt and edit these training materials as needed for your own campaigns.

## Five Sections in This Manual

1. Introduction: Why We Are Doing This
2. One-on-One Conversations
3. Tracking Our Progress
4. Lists, Maps and Charts
5. The Work-Site Structure

*Depending on your audience, you may conduct training on one or more sections in this manual.*

We recommend:

- For member organizers: Sections 1-3
- For lead organizers and work-site leaders: Sections 1-5

Section	Time Needed	Title
1	15 minutes	Introduction: Why We Are Doing This
2	60 minutes	One-on-One Conversations
3	15 minutes	Tracking Our Progress
4	45 minutes	Lists, Maps and Charts
5	45 minutes	The Work-Site Structure

## Instructional Objective

Using resource materials to conduct one-on-one conversations, participants will gain confidence in having purposeful conversations with their colleagues and asking them to participate in real/current issues of concern. Success will be measured by contact report forms, which chart colleagues' degree of support for the issues.

## Resources and Reference Materials

- Handout 2-1: Motivating People to Act/AHUY
- Handout 2-2: Sample AHUY Messages/Raps
- Handout 2-3: "Yes Buts..." and FAQs
- Handout 2-4: Using the AAR Approach/FFF Technique
- Handout 2-5: What Are Assessments and Why Do Them?
- Handout 3-1: Sample Contact Report Form

- Handout 3-2: Contact Report Form
- Handout 3-3: Work-Site Conversation Debrief Form
- Handout 3-4: Instructions for Tracking Our Progress
- Handout 3-5: Coaching Questions/Debrief Agenda
- Handout 4-1: Gathering Valuable Information and Data
- Handout 4-2: Membership List—Teachers/PSRPs
- Handout 4-3: Work-Site Map—School
- Handout 4-4: Membership List—Public Employees
- Handout 4-5: Work-Site Map—Public Agency
- Handout 5-1: Work-Site Structure Chart
- Handout 5-2: Roles and Responsibilities
- Handout 5-3: How Many People Do We Need?

#### [Additional Resources and Reference Materials](#)

- Appendix 1: Member Engagement Tools
- Appendix 2: Mobile Tool Kit Training Guide
- Appendix 3: Agency Fee Conversation Guide
- Appendix 4: Community Engagement Tools
- Appendix 5: Community Schools
- Appendix 6: Campaign 2016

## **Display** PowerPoint Presentation “The Time is Now!”

**Read or paraphrase** the following script.

### **Why a resolution?**

**PPT #2**

- The gap between the super-rich and everyone else has widened in the last 35 years. Today the top 1 percent takes in almost 20 percent of the country’s total income, while owning 35 percent of America’s wealth.
- And CEOs have fared even better: In 2009 CEO pay doubled what it averaged in the ‘90s, quadrupled what it averaged in the ‘80s, and was about eight times larger than it averaged around the middle of the 20th century.
- It’s a good time to be a CEO in our economy, but it’s much harder for most of us: struggling to make ends meet, worrying about the future for our kids and families.
- We know that when unions were at their strongest, the middle class was at its height. And today, even with the sharp decline in union density, union members make 28 percent more than nonunion workers.
- Corporate-backed politicians want to preserve the status quo and, understanding that unions give working people power, have launched an all-out assault on unions—from statehouses to courthouses.

### **A National Coordinated Attack**

**PPT #3**

This is a national, coordinated attack. Initiatives like Right to Work are ways to attack our infrastructure in order to weaken our ability to even the playing field and provide economic stability for everyone.

### **A National Coordinated Attack – continued**

**PPT #4**

- And they’re not stopping at right to work initiatives and attacks on collective bargaining. Even non collective bargaining and Right to Work states are fending off attempts to gut our ability to collect dues.
- The fight is both legislative and legal. From Harris V Quinn to the Friedrichs V CTA case, our enemies are using our statehouses and courts to dismantle the labor movement.
- And now they have a ground game.

### **Opposition Literature**

**PPT #5**

- After the courts made agency fee illegal for home health care and home child care workers through the Harris V Quinn decision, The Freedom Foundation in Seattle, Washington put together an organizing campaign aimed at convincing home health care and home child care workers to drop their membership in SEIU.
- The first part of the campaign included mailing these brochures to every SEIU member homes.



The also ran television and newspaper ads with the same message.

## **Paid Canvassers**

**PPT #6**

- To follow up on their communications campaign, they hired canvassers to knock on SEIU members' doors to solicit them to drop their membership.
- Their message? Don't let the union waste your hard earned money. Give yourself a pay raise! You'll get all of the benefits of the contract whether you're a member or not.
- To make the transition easy for these workers, they had drop forms ready to sign and in many instances, the Freedom Foundation was successful.
- An important note: SEIU has looked at those who dropped their membership and found that the majority of people who are most likely to drop were not divided by political affiliation or income level. But rather how engaged they had been with their union. People who filled out bargaining surveys, attended meetings and rallies, talked with other members about the union—were MUCH LESS LIKELY to drop their membership than those who were disengaged.

## **The Drivers of Income Inequality**

**PPT #7**

- So who's doing this to us? Is it?
  - » (Click 1): Management?
  - » (Click 2): Politicians?
  - » (Click 3): The invisible, omni-potent hand of fate?

## **Who is Doing This?**

**PPT #8**

The Koch's have \$50 billion and an ALEC communications arsenal and an army of anti-union front groups:

- State Policy Network—which has an affiliate pushing anti union policy in all 50 states [www.spn.org/directory/](http://www.spn.org/directory/)
- Center for Individual Rights (CIR)
- Freedom Foundation (Evergreen)
- National Institute for Labor Relations Research
- National Right to Work Committee (NRTWC)
- National Right to Work Legal Defense Fund...

The Koch Brothers have teamed up with the Walton family, Wall street and big banks to fund their attacks.

## **Their Vision for America**

**PPT #9**

- What is their vision?
  - » Re-segregating our schools
  - » Taking as much as they can out of public revenues
  - » Increasing income inequality

## **Power Starts with Us?**

**PPT #10**

- The great news is we are 1.6 million members strong and we know how to fight!
- Our affiliates understand that we only succeed through collective power. Thus, we are engaging our communities, advancing proven solutions, and organizing and mobilizing members to repel those attacks and grow a strong middle class.
- As a result of this organizing and mobilization, the AFT passed the 1.6 million mark last summer. Nurses affiliated with our union. Charter school teachers and adjunct professors organized. Agency fee payers converted. And the rank-and-file membership continues to grow, as the connection between members and our union is strengthened.
- Where our affiliates are doing this work—side by side with their communities and in line with every level of the union, local, state and national—the connection between the union and its members is strong.
- We have each other's back.

## **Reclaim the Promise of America**

**PPT #11**

- We are fighting a battle that is ultimately over who holds the power in our economy and our democracy. It is a battle to reclaim the promise of America.
- To combat those who wish to undermine unions, we must strengthen the bond with all members. We must show them that workers are the union. We must engage in a collective conversation about the challenges we face, the aspirations we have and the strategies we must implement. We must create the collective will and shared avenues for our members, along with community partners, to fight those obstacles and reach those aspirations
- That's why in July, our executive council passed a resolution calling on our union to double the number of member activists to 10 percent, triple the number of members who engage in any union activities to 70 percent, and—in this our 100th year—reach out and speak to 100% of our members. And while less than 10 percent of those we represent are agency fee payers, we will reach all of them, with the goal of their choosing to have their voices heard as union members

## **Our Plan to Build Power**

**PPT #12**

Here are the components of our plan.

- We need to help our colleagues understand what’s at stake and the urgency of the situation.
- We need to build and strengthen leadership structures in each of our worksites that enable us to build real relationships with each of our members.
- Finally, we need to double down on not only engaging our members, but mobilizing around issues that they care about.

This resolution is a compact between every AFT local. We know that our collective strength is dependent on each local strengthening their ability to engage and mobilize their members. It will take each of us being “All In”, to achieve our goals.

### **Reclaim the Promise of America is Possible**

**PPT #13**

We are fighting a battle that is ultimately over who holds the power in our economy and our democracy. It is a battle to reclaim the promise of America. An America where:

- All Americans can send their child to a neighborhood public school that is child centered, not test obsessed.
- All Americans can send their children to college without incurring crippling debt.
- All Americans can get a well-paying job that allows you to raise their family and be an active member of your community.
- All Americans can have voice through collective action both at work and at the ballot box.
- All Americans can have paid sick leave to take care of a sick child or elderly parent.
- All Americans can get good health care when they get sick.
- All Americans can turn a lifetime of work into a retirement with dignity.
- All Americans can live free from discrimination or fear of bullying or racial profiling, or because of a broken immigration system, wage theft or deportation.

***If we are “All In”, we CAN fight forward and win!***

### **AFT Member Engagement Training**

**PPT #14**

Objectives for member organizing training (Sections 1-3)

- Leaders, staff and activists will gain confidence in having purposeful conversations with their colleagues and asking them to participate in real/current issues of concern.
- Success will be measured by contact report forms, which hart colleagues’ degree of support for our issues.

## Objectives for lead organizers and building reps (Sections 1-5)

Using the instructor notes and resource materials to engage and mobilize local members, lead organizers and work-site leaders/stewards/building reps will provide member activists with the skills to:

- Gain confidence in having purposeful conversations with their colleagues and asking them to participate in real/current issues of concern.
- Complete contact report forms, which chart colleagues' degree of support for the issues.
- Depict a work site and organize information with lists, maps and charts.
- Determine if a work site has sufficient resources (people) to sustain a strong and effective union structure.

### **"All In"**

**PPT #15**

- Are you "All In"?

# One-on-One Conversations

---

## INSTRUCTOR NOTES

### Instructional Objectives

Using the tips and tools provided to conduct one-on-one conversations, member activists will gain confidence in having purposeful conversations with their colleagues.

### Resources and Reference Materials

- Handout 2-1: Motivating People to Act/AHUY
- Handout 2-2: Sample AHUY Messages/Raps
- Handout 2-3: “Yes Buts...” and FAQs
- Handout 2-4: Using the AAR Approach/FFF Technique
- Handout 2-5: What Are Assessments and Why Do Them?

### Instructor Directions

#### 1. Introduction

**State or paraphrase** the following:

Section 2 is all about engaging our members and motivating them to act.

We will review the elements of an effective one-on-one conversation. Experience tells us that every conversation counts in:

- Building a new group or organization that’s never existed before.
- Challenging individuals to act against their prior experience of futility.
- Inspiring workers to overcome fears of their boss.

People get active in their union when there is something they care about—an issue or concern—when they see their union has a plan to address issues that matter to them, and when someone asks them to get active about that issue in a one-on-one conversation.

**Display** PowerPoint Slide #4: Marshall Ganz Quote

*“Organizers challenge people to act on behalf of their shared values and interests.”*

– Marshall Ganz, Harvard Kennedy School of Government

## 2. Motivating People to Act/AHUY

**Display** PowerPoint Slide #5: When to Use AHUY

We use one-on-one conversations for:

- creating a story/message
- phone conversations
- a written rap
- 1-on-1 meeting, committee or work-site meeting

**Any time you are organizing and motivating people to act.**

**Display** PowerPoint Slide #6: One-on-One Conversations/AHUY

**Review and discuss** this simple framework for an effective conversation. As you point out each step, share a few points about it. See background information below.

- Introduction: Why are you having the conversation now?
- Issues: What do your colleagues care about?
- **A:** Agitate and push your colleague past their comfort zone = **Anger**
- **H:** Plan to win = **Hope**
- **U:** The time is now = **Urgency**
- **Y:** The ask: Be a part of the solution to make a difference = **You**
- Closing

### AHUY Background Information

PPT #7-10

#### Step 1: Introduction

Begin your one-on-one conversation by introducing yourself. Stress the importance of the conversation. If the person you are talking to says “no” or hesitates in response to something, try to keep the conversation going.

#### Step 2: Issues

Once we have the attention of the member or potential member, we need to learn about who

the person is and what is important to him or her. Use active listening. Ask fact-based, detailed questions. Ask questions that allow the person to talk about his or her issues at work.

### Step 3: Anger/Agitation

One of the reasons we discuss the issues is to inspire people's anger and indignation—to agitate people about the issues they want to change.

- Often a person is angry with a school district, hospital or government agency, or with a superintendent or individual manager. Sometimes an employee blames the "system."
- It helps to direct people's anger, but it is often more valuable to agitate someone about his or her own inaction—the fact that no matter who is at fault, he or she has never done anything to change the things he or she can't stand.

***Ultimately, to get someone to act, we have to get them a little bit angrier (or righteously indignant) than they are afraid.***

### Step 4: Plan to Win = Hope

People feel hopeful when they believe change is possible. Now that the member or potential member is angry, we have to show him or her that there is a way to do something about it.

As leaders/organizers, we have to paint a vivid picture of ***the plan to win***. This can't be just any plan. Our plan has to be:

- » ***Specific:*** The steps are clear—people can understand them.
- » ***Achievable/Proven:*** It is possible—the plan has worked in the past, is working now or has worked somewhere else.
- » ***Credible:*** Our plan has to sound plausible, and the person has to be able to imagine it happening in his or her own workplace or community.
- » ***Meaningful/Valuable:*** If our plan works, the results will make a difference to the person and his or her co-workers.

### Step 5: Urgency

As community organizer Fred Ross stated, "A good organizer must be able to charge an issue with a supreme sense of urgency."

OK, we're on a roll—the person is angry and he or she has a credible plan to win, but we can't wait months to take action—it has to happen right now, and we have to create a sense of urgency in the person we are organizing/mobilizing.

How do we create urgency?

- » In an election campaign, it is fairly easy to create a sense of urgency—you have a built-in deadline of Election Day, and a clock is ticking until that time.

- » More often, however, we are organizing/mobilizing without natural deadlines. When this is the case, you have to **create** deadlines and **goals** that must be met.

### Step 6: You Make the Difference—the Ask

Finally, now that the person you are organizing has a reason to act (anger), understands a credible plan to win (hope) and feels a supreme sense of urgency, we challenge him or her to act.

No matter how small, the action must be:

- » **Specific:** Exactly who will he or she talk to, when and for what purpose, and what is the follow-up plan?
- » **Meaningful:** His or her contribution cannot be busy work. It must make a meaningful contribution to the plan. Ultimately, you want to motivate people to take responsibility for winning.
- » **Achievable:** The person must be able to succeed. When he or she experiences success, it will give him or her the confidence to come back and take on more responsibility.
- » **Part of a Team:** The person has to know that he or she is part of a team of people who are doing the same thing—working together to make the plan succeed.

### Step 7: Closing

Thank the person for strengthening our union and wrap up by leaving on a positive note.

If the person decides to join the union, get his or her contact information and indicate that he or she will be receiving materials soon.

## Skill Practice Optional Activities

PPT #11-15

Option 1: A 2004 speech by Barack Obama or Gandhi Clip.

**Display** PowerPoint Slides #11-12: Barack Obama Speech and Video Review

**View** the video and look for the elements of an organizing conversation.

After the video, **facilitate** a discussion using the following questions:

- What was Obama's/Gandhi's purpose in telling his story? What was he moving people to do?
- What values did his story convey?
- What details in particular reflected those values?
- What part of his story demonstrated: Anger/Agitation, Hope, Urgency and You?

Option 2: **Distribute** Handout 2-2: Sample AHUY Messages/Raps.



## Construct an AHUY message:

PPT #13

- Read the provided scenarios.
- Re-order to create AHUY conversations.

**Display** PowerPoint Slides #14-15 to check their work.

## 3. Our Rap

PPT #16

- Think of the rap as a script. It is not prescriptive. It is not to be read from. The only part of a one-on-one rap that must be consistently stated is the ask (or the question). That's because the ask is the basis of our assessment.
- The rap is a training tool for a purposeful conversation. It is a confidence-building tool. It helps an activist prepare to hold a conversation with another member or potential member.
- But, while the rap is not to be memorized, the five elements of a rap must be completed! No component should be skipped. And, as noted earlier, the question—the ask—must be asked using the same construct by every activist. This will be important when we are determining how effective our organizing campaign is and if there are adjustments that must be made.

## Construct and Practice Your RAP

Use your local's goals and information to write your rap/AHUY message.

Be sure to include your plan of action.

## Role-Play Raps

PPT #17

It's one thing to talk about these behaviors; it's another thing to see them. Working in pairs, let's practice our rap and see what it looks like in action. **Allow** six minutes per practice.

Activist: Draw upon your communication skills, active listening skills and union knowledge to in-oculate and overcome objections, assess and agitate, and move to action.

Member/potential member: It is up to the organizer to identify and respond to your concerns with persuasive arguments.

Critique: Give feedback to the organizer by identifying the strongest parts of each conversation and offer ideas for alternative approaches.

Rotate roles within the group and repeat.

## 4. Dealing with Objections—Optional

PPT #18-20

*(if time permits)*

There will be colleagues who are not convinced of the sincerity of the union or the value of joining it. Their concerns and objections are usually expressed in a “yes, but...” construct.

Note that “yes, but...” concerns are different from the issues we probe in a one-on-one conversation. Issues are what members raise in relation to what should be changed by the employer, such as pay, respectful treatment, etc.

What are some “yes, but...” we’re likely to hear from our members when asking them to recommit to the union?

(Have the group brainstorm some examples and put these on flip charts. Leave space under each one to come back to.)

**Distribute** Handout 2-4: Using the AAR Approach/FFF Technique.

Assign table groups an objection listed on the flip charts. Ask them to brainstorm with members of their group what we can say in response to the objection.

Ask participants to decide how they would deal with the objection using the AAR or FFF method.

Report/model for the group.

## 5. Assessment

**PPT #22-24**

**Read or paraphrase** the following:

Assessments should be used to record each conversation about joining the union or becoming active in the union’s activities, based on criteria established by the local’s campaign. The AFT recommends using a four-point assessment scale.

**Review** Handout 2-5: What Are Assessments and Why Do Them? and explain that the four-point scale can change per campaign and per local.

**Display** PowerPoint Slide #23

Take a moment to [review this example](#) of a four-point assessment scale and ask participants to rate the following examples.

1. An activist and contract campaign committee member takes assignments and completes them, takes action, does work and/or moves colleagues to take action.
2. Becomes a member of our union.
3. Has not become a member but is willing to have further conversations.
4. Refuses to join or help our union and/or is anti-union.

Have a discussion about the scale on the slide and ask participants to decide if it makes sense for their campaigns or if there are adjustments to be made.

Hopefully, the issue of an “undecided” rating will come up. Make the following point:

We want to emphasize that there are no “undecideds.” We feel strongly that **“undecided” should not be a choice.** Activists must try to determine where bargaining unit members stand. If you are not sure, the conversation wasn’t complete and the person should not be assessed.

## 6. Summary and Close

PPT #24

**State or paraphrase** the following:

One-on-one communication is the primary tool we as member activists can use to bring people closer to the union, to have them support the union through membership, and to have them make the union stronger by becoming involved.

Generally, the goal of all organizing conversations is to build or strengthen our relationships with members and potential members.

**Ask and answer** any questions.

# Motivating People to Act/AHUY

---

## HANDOUT 2-1

In the late 1980s a group of organizers came together to analyze and develop a science of organizing. One of their findings was that all organizing conversations should follow the “AHUY” model, a framework developed to help organizers understand the elements of motivation.

### **A = Anger/Agitation**

- To take action, people need to be a little angrier than they are afraid.
- As organizers, we need to inspire “righteous indignation” to help people act.

### **H = Hope**

People have hope when they believe change is possible. To create hope, we have to paint a picture of the **plan to win** that is:

- **Specific** The steps are clear and people can understand them.
- **Achievable** It is possible—the plan has worked in the past or is working now.
- **Meaningful** The results will make a difference.

### **U = Urgency**

As community organizer Fred Ross stated, “A good organizer must be able to charge an issue with a supreme sense of urgency.”

- Use goals and deadlines to create a sense of urgency.
- If there are no natural deadlines, you have to create them.

### **Y = You Make the Difference**

Now that the person you are organizing has a reason to act (anger), understands the plan to win (hope) and feels a supreme sense of urgency, we challenge him or her to act. No matter how small, the action must be S.M.A.rT:

- **Specific** Exactly who will the person talk to, when and for what purpose, and what is the follow-up plan?
- **Meaningful** It must make a meaningful contribution to the plan to win
- **Achievable** The person must be able to succeed. That will give him or her the confidence to take on more responsibility.
- **Part of a Team** The person has to know that he or she is part of a team of people who are doing the same thing—working together to make the plan succeed.

*Adapted from Marshall Ganz, Harvard Kennedy School of Government and United Farm Workers of America.*

# Sample AHUY Messages

## HANDOUT 2-2

Instructions: Re-order these two scenarios to create an AHUY message.

### Contract/Consultation Campaign

\_\_\_ Tomorrow's the day every member stands up for students, not Porsches.

\_\_\_ Exactly. Now is the time to hold the superintendent accountable for what's best for students and those of us who make our school work. That's why members are doing three things:

- 1) Asking colleagues to join—there's strength in numbers.
- 2) Signing this petition that says, "Put students before Porsches."
- 3) Wearing a button on April 23 that says, "Porsches."

\_\_\_ Hi, how's your day? Have you heard about the negotiations with the district?

Our negotiating team and members like you are working to get the most number of improvements possible. What would you like to see improved?

Superintendent Smith says there's no money in the budget for new desks and materials, but did you see the pay raises the superintendent and all the principals got this year?

\_\_\_ Can members count on you to sign the petition now and wear this button tomorrow?

### Political

\_\_\_ Early primary voting starts in a week.

\_\_\_ Hi, I'm \_\_\_\_\_ with the campaign to elect Johnny for state Senate.

For the last 10 years, our current state senator, Bob, has voted against measures to protect home owners, voted to cut school funding and voted to eliminate working families' retirement. What do you think about that?

\_\_\_ Can I count on you to vote in the primary for Johnny?

Great! Your poll place is at MLK Library on 7th Street and MLK Road.

\_\_\_ This is why as an educator in LaLa Schools I am supporting Johnny for state Senate. Johnny believes we should have the rich pay their fair share so we don't cut funds from our schools. When we invest in our kids, we invest in our communities.

# “Yes, but...” and FAQs

---

## HANDOUT 2-3

There will be members who are not convinced of the sincerity of the union or the value of a contract campaign. Their concerns and objections are usually expressed in a “yes, but...” construct.

“Yes, but...” concerns are different from the issues we probe in one-on-one conversation. Issues are what members raise in relation to what should be changed by the employer, such as pay, respectful treatment, etc.

Examples of “yes, but...” include:

- Yes, but I’m too busy to get involved.
- Yes, but getting involved won’t make a difference.
- Yes, but management is too strong and holds all the cards.

By thinking through our responses to the issues that might come up, we can develop an FAQ list that we can use either for internal use or to make our case publicly.

1. “Yes, but...” are not issues but rather concerns with the union or the campaign.
2. These are legitimate concerns and are important to address, track and record.
3. The “yes, but...” become the basis of our FAQs (issues become the basis of our talking points).
4. FAQs can be private, internal documents (for example, to be used in a training) or public materials that help make our case and set the record straight.
5. But, too many “yes, but...” in one conversation or over many conversations becomes a warning signal!

# Using the AAR Approach

---

## HANDOUT 2-4

### Affirm, Answer, Redirect Approach

The “yes, buts...” in a conversation should be addressed with more than a simple response. We recommend the “affirm, answer, redirect approach”:

- Affirm (It’s about respect)
- Answer (To provide information)
- Redirect (To build our campaign and our power)

When we prepare for a one-on-one conversation, it is important to know how to respond to the “yes, buts...,” but we must also know how to refocus the conversation on our intent—to engage our members in the campaign and to take action. That’s why we train ourselves to handle the “yes, buts...” in the following manner:

1. **We affirm.** Every “yes, but...” is legitimate and raised because our members are concerned, worried or, in some cases, afraid. It is important to let our members or potential members know that what they raise is a valid concern and a good point. That’s why it is important to acknowledge their concerns rather than being dismissive. For example, if someone says “I’m too busy,” we might affirm that by stating, “Of course, I know you have been working hard on getting your master’s, and that’s really important.”
2. **We answer.** In the case of the person who is too busy, we’ve come up with many possible responses (refer to the flip chart). For example, we can point out that much of what is needed during a contract campaign can be done at work and will not take up a significant amount of time after work.
3. **We redirect.** Once we’ve responded to their concerns, it’s time to refocus on our goal involving that member. In the case of the person who is too busy, we might say, “Since our campaign for a fair contract starts with actions here at work, would you be willing to talk to three colleagues and ask them to wear a button?”

# Using the FFF Technique

---

## HANDOUT 2-4

### Feel, Felt, Found Technique

So, what do you do when someone says “no” to your ask in an organizing conversation?

- Don’t panic. It is not personal. Remain composed and confident rather than defensive and confrontational.
- Try to uncover the objection (as specifically as possible) through polite inquiry.
- Watch the total person and listen to understand any feelings associated with the objection or if there is a “message behind the message.”

An effective technique for dealing with objections is the “feel, felt, found technique.” This technique, which relies on your knowledge and experience, is as follows:

**Feel:** You make an expression of understanding or empathy with the objection expressed.

*“I understand how you feel about not having time to attend the union meeting.”*

or

*“A lot of people first feel that these meetings are not worth the time.”*

**Felt:** You connect your own experience to the objection.

*“I always felt that there were more important things to do.”*

**Found:** You relate your personal knowledge or experience to counter the objection.

*“But after I attended a few meetings, I really started to benefit from the information shared. Plus, I like being part of shaping our union’s agenda.”*



# What Are Assessments and Why Do Them?

---

## HANDOUT 2-5

After engaging a person in a one-on-one conversation, organizers should conduct an assessment to determine that worker's degree of support for the union, based on the directly observable verbal, visual and behavioral indications uncovered during the conversation. Assessments are conducted several times during the life of an organizing campaign and for various strategic purposes. Although the underlying reason for assessments is to measure level of union support at any given point in time, assessments also are used to:

- Track movement of support.
- Guide allocation of time and resources in a campaign.
- Provide a road map of your greatest strengths and weaknesses in a campaign.
- Measure committee effectiveness.
- Uncover issues.
- Gain feedback on effectiveness of tactics and issues.
- Assess outcomes of worker "tests" throughout the campaign.
- Test the effectiveness of employer campaigns.

Conducting assessments is a fundamental skill that organizers must learn and constantly practice. Conducting assessments effectively calls upon an organizer's skills in communication and observation, especially listening skills.

Assessments must be:

- As precise as possible
- Directly observable
- Measurable



# Tracking Our Progress

---

## INSTRUCTOR NOTES

### Instructional Objectives

- Activists will learn how to complete a contact report form for all one-on-one conversations assigned to them.
- Work-site leaders and local representatives will learn how to debrief work site conversations with their activists and complete a work-site conversation debrief form.

### Resources and Reference Materials

- » Handout 3-1: Sample Contact Report Form
- » Handout 3-2: Contact Report Form
- » Handout 3-3: Work-Site Conversation Debrief Form
- » Handout 3-4: Instructions for Tracking Our Progress
- » Handout 3-5: Coaching Questions/Debrief Agenda

### Instructor Directions

#### 1. Introduction

**State or paraphrase** the following:

One of the most important steps after having the conversations with our member and potential member colleagues is to organize that information.

All local unions should distribute and use a tracking form in order to easily track the progress of the work.

Contact report forms and work-site conversation debrief forms are two forms to help us track our progress and plan next steps as we sign up and activate more members in our union.

- If an activist accepts an assignment to talk to other members to engage and mobilize them, the person should receive a list of people to contact and contact report forms.
- Contact report forms are used to track every conversation and to assess and capture various issues and concerns.

- Work-site leaders and state staff representatives use conversation debrief forms to keep track of their conversations and those of the activists.

## **2. Review and discuss Handout 3-1: Sample Contact Report Form. Answer any questions or concerns.**

All contact sheets should be kept in a central location so everyone charged with conducting the one-on-one conversations can access them. Handout 3-2 is a blank form for your use.

## **3. Distribute Handout 3-3: “Work-Site Conversation Debrief Form” and Handout 3-4: Instructions for Tracking Our Progress.**

Review and discuss instructions for work-site leaders and local representatives.

- Activists should return all completed contact forms to a work-site leader.
- Work-site leaders use conversation debrief forms to keep track of their conversations and those of the activists.
- Local representatives:
  - a. Collect or copy all contact and debrief forms.
  - b. Tally up all the numbers and submit them weekly to the local union, state federation and/or AFT.

## **4. Ask and answer any questions.**

# Sample Contract Report Form

## HANDOUT 3-1

Leader/Activist: Jamie Henderson

Date: 9/15/15

Work Site: Portage Elementary School

Return This Form To: Bob Morgan

Worker Name: Cooper Anderson Years of Service: 2

Address: 1805 Broadstone Road

City: Portage State: Ohio Zip: 48236

Phone:

Home: 614-555-1212 Cell: 614-555-1234 Work: 614-555-4321

Personal Email: cooperanderson@mac.com

Worker:  Member  New Employee  Fee Payer  Joined

Issues/Workplace Concerns:

Notes

1. Salary
2. Planning Period

1. We haven't received a raise since the beginning of the recession.
2. Often asked to teach other classes during my planning period.

Joined the Union:  Yes  No

Assignment/Follow-Up:

- Date of Follow-Up Assignment: Agreed to meet on Tuesday to discuss issues with other employees concerned with planning period.
- Name of Person Following Up: Jamie Henderson

Comments:

# Contract Report Form

## HANDOUT 3-2

Leader/Activist: \_\_\_\_\_ Date: \_\_\_\_\_

Work Site: \_\_\_\_\_

Return This Form To: \_\_\_\_\_

Worker Name: \_\_\_\_\_ Years of Service: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone:

Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

Personal Email: \_\_\_\_\_

Worker:  Member  New Employee  Fee Payer  Joined

Issues/Workplace Concerns: \_\_\_\_\_ Notes

1.

2.

3.

Joined the Union:  Yes  No

Assignment/Follow-Up:

- Date of Follow-Up Assignment: \_\_\_\_\_
- Name of Person Following Up: \_\_\_\_\_

Comments

# Work-Site Conversation Debrief Form

HANDOUT 3-2

Work Site: \_\_\_\_\_ Activist/Leader: \_\_\_\_\_ Week Ending: \_\_\_\_\_

Name	Non-Member Type		Member Assessment				COPE	Issues
	New	Fee Payer Y/N	1	2	3	4		

# Instructions for Tracking Our Progress

---

## HANDOUT 3-4

Use the contact report form and the conversation debrief form to help track our progress and plan next steps as we sign up and activate more members in our union.

1. If an activist accepts an assignment to talk to other members to engage and activate them, the person should receive a list of people to contact and contact report forms. These forms are used to help track conversations and to assess and capture various benchmarks.
2. Activists should return completed contact forms to a work-site leader.
3. Work-site leaders use conversation debrief forms to keep track of their conversations and those of the activists.
4. Local representatives collect or make copies of all contact and debrief forms, tally up all the numbers and submit them weekly to the local union, state federation and/or AFT. Use these two forms to help track our progress and plan next steps as we sign up and activate more members in our union.



# Coaching Questions/Debrief Agenda

---

## HANDOUT 3-5

### **For Work-Site Leaders and/or State Representatives**

- What were the concerns expressed by the member/potential members?
- Were you able to listen 80 percent of the time? If not, what was the split between listening and talking?
- Did you ask open-ended questions?
- How did people respond to them? What did you say back to them?
- If you could do it again, would you do anything differently? Why? Were there any key statements on which you based your assessment?
- What do you think the next steps are to take with this member?

### **Agenda for Group Debrief**

1. Report numbers (inform before meeting).
2. Keep it brief—don't launch into explanations.
3. Ask questions to elicit highlights of what worked.
4. Invite activists to share "issues" they want the group to tackle.
5. Close with a set date for the next meeting and clear, measurable assignments for each person before the next meeting.

# Lists, Maps and Charts

---

## INSTRUCTOR NOTES

### Instructional Objective

Mapping and charting the workplace, and understanding the relationships that exist within the workplace, are tools leaders and activists use when creating a strategy to reach out to co-workers who are not active or are not members of the union.

This section will clarify the difference between charting and mapping and provide the following skills:

- How to depict a work site and organize information for mapping.
- How to use mapping for target purposes.

Activists will appreciate the value of “seeing” the status of a workplace on a wall chart and be able to:

- Develop useful workforce charts.
- Integrate assessments and tests in charts.
- Use charts to plan work.

### Resource and Reference Materials

Handout 4-1: Gathering Valuable Information and Data

Handout 4-2: Membership List—Teachers/PSRPs

Handout 4-3: Work-Site Map—School

Handout 4-4: Membership List—Public Employees

Handout 4-5: Work-Site Map—Public Agency

### Instructor Directions

#### 1. The Art and Science of Mapping and Charting

**Display** PowerPoint Slide #3

Organizing is both an art and a science. Often, we look at the unit we are given and are overwhelmed by the number of people who are not members and who are not active in helping us change our workplace.

This is why we need a systematic way to analyze the status of our co-workers and what we need to do to move them.

### **Why Do We Do This?**

- Organizing doesn't just "happen."
- It is important for visual references.
- It is important to keep for historical references.
- Public structures are constant, and people usually know where workers and departments are in the building.
- It is important for work-site leaders to understand the scope of the work sites.
- It makes it easier to identify potential members and members we are trying to activate.

## **2. Lists**

**State or paraphrase** the following information:

- Maintain data integrity in order to keep information consistent and standardized.
- Don't throw away any data. If you have them, keep employee codes and payroll codes—those unique sets of identifiers that employers use for their workers. Keep employer job title codes and employer building codes as well.
- Get initial lists in machine-readable form, if you can.
- Build databases with drop-down options in order to keep information consistent.

Distribute Handout 4-1: Gathering Valuable Information and Data.

Review and discuss the information locals need and why it is important.

## **3. Maps**

**Display** PowerPoint Slides #4-9

Organizing maps generally show the location of every worker and depict the workplace in a way that clarifies spatial and work relationships.

Prioritizing our work is important in a world and a campaign where there is never enough time.

Mapping is a tool we use to help us prioritize our work.

For example, we want to hold one-on-one conversations with everyone in the bargaining unit but time is limited. Where should we focus our conversations?

By mapping our work sites and determining where activists are located in relation to other members/potential members, we can prioritize our work and give assignments that are the most efficient.

By mapping a work site, we might find, for instance, that one activist is located in an area where we have a number of members/potential members who are unassessed.

We can assign that activist to have one-on-ones with those individuals. Conversely, if there is an activist in a part of a building where everyone is assessed as a "2," we might direct that activist to go to another location to meet with members/potential members.

## Why Map?

PPT #5

**Write** on the top of a flip chart: Why Map? How Do You Get What You Need? and What to Include.

**Record** group responses and **compare** results.

## Review and discuss

### How Do You Get What You Need?

PPT #6

- It's already there! Ask for it. i.e. building map, worker lists, directory, etc.
- Activists, building reps, committee members, etc.
- Members
- One-on-ones
- Debriefs
- Research

### What to Include

PPT #7

- Geographic depiction of the work site: entrances, break rooms, offices, etc.
- Location of workers
- Worker identifications
- Location of supervisors
- Grouping of workers

- Names of workers and others
- Activists, building reps and committee members

### **Read or paraphrase**

While we talk about building relationships in one-on-one conversations, we often don't take advantage of the relationships that already exist in our workplace. These relationships are key to mobilizing people quickly.

### **Mapping Activity**

**PPT #8**

**Divide** into groups and fill in maps and charts for 20 minutes

**Explain exercise:** Using Handouts 4-2 and 4-3 or 4-4 and 4-5, develop a list of activities that would help your local attain full membership at this work site.

**Allow** five minutes at end for participants to share with the other tables what they did with their maps and charts.

### **Map Summary**

**PPT #9**

## **4. Charts**

**Display** PowerPoint Slides #10-12

**State or paraphrase:** Another campaign tool is charting. Wall charts are an invaluable strategic planning tool and provide a graphic representation of where the campaign stands at any point in time.

The placing of information in a schematic form, generally on the wall, allows for immediate visual interpretation. Information on the chart should always be up to date.

**State or paraphrase:** Charts are very important because they take a series of snapshots—assessments—and track movement over time.

### **Why Chart?**

**PPT #13**

Write on the top of the flip chart: Why Chart?

Record the groups responses on a flip chart. Compare results with the PPT slide.

**Review and discuss:**

### **Charting Golden Rules**

**PPT #14**

- Important at every stage.
- Can be used in many formats.

- Allows different views of a campaign.
- Can be very sophisticated or simple.
- Tracks movement.
- Key planning and decision-making tool.

### How to Create a Chart

PPT #15

- Determine the use of the chart.
- Determine the data subsets based on your goal.
- Use date if relevant.
- Remember the value of seeing data.
- A wall chart should provide data quickly.

### What to Include

PPT #16

**Ask** the group what they have included on their workplace charts.

**State or paraphrase after the group's report:** Note that in the case of large units, many charts may be required. At a minimum, a chart should include some identifying information of the employees: job title, shift, work location, department, grade or other data.

Each chart also should include a way to track tests and assessments, particularly campaign status, such as whether the employees are involved in the organizing committee.

More detailed information, such as home addresses, union history and comments, usually stays in the database.

### Instructions for Charting Exercise

PPT #18

**Explain exercise:** Using Handouts 4-2 and 4-3 or 4-4 and 4-5, develop a list of activities that would help your local attain full membership at this work site.

**Divide** into groups of four people to work on this question:

***“How could the geographic, work and social relationships play into a strategy to organize workers in this workplace?”***

Your goal is twofold. First, ask what other information you'd want to see on the chart.

Second, based on what the chart tells you, list the next steps you will take in the campaign. Let's regroup in 15 minutes.

**State or paraphrase:** One person from each group should report on your analysis of the cam-

paigned based on looking at your group's chart. Then tell us what other information you would like to see included in your group's chart.

### **Report Out/Debrief**

Each team will share their strategies with the rest of the group.

1. Looking at your maps and charts, what areas need concentration or are lacking members?
2. Who should be targeted for membership? New leaders?
3. What would your next steps be in this workplace?
4. What information could be added to the map (for example, social circles)?

### **5. Summary and Close**

**PPT #19**

Lists, maps and charts are key components of any campaign (issue, contract or political). It allows you, as the organizer, work-site leader or staff representative, to record and study information in an immediately usable way.

# Gathering Valuable Information and Data

---

## HANDOUT 4-1

**Maintain data integrity** in order to keep information consistent and standardized.

**Don't throw away any data.** If you have them, keep employee codes and payroll codes—those unique sets of identifiers that employers use for their workers. Keep employer job title codes and employer building codes as well.

Get initial lists in **machine-readable form**, if you can.

Build databases with **drop-down options** in order to keep information consistent.

To create a quick database, use Outlook or create a Gmail account and enter your information in an address book. Excel is excellent for entering data and building the initial database and then importing data into Access. However, sorting in Excel can create disorder. Use Access whenever possible.

## Data

- Name (use six fields)
  - » Prefix (use drop-down for Mr., Ms., Mrs., Dr., Rev., Adm., etc.)
  - » First name
  - » Nickname
  - » Middle name/initial
  - » Last name
  - » Name suffices (Jr., III, PhD, JC, Esq., MSW, PE, etc.)
- Job Title
- Workplace
  - » Department
  - » Building
  - » Floor
  - » Supervisor
- Work Information
  - » Status (active, layoff, temporary, leave, etc.)
  - » Shift
  - » Start and quit times
  - » Hours worked (part time, full time, etc.)
  - » Days worked
  - » Pay-grade level (pay rate)
  - » Date of hire



- Phone Numbers
  - » Home phone number
  - » Personal cell phone number
  - » Work phone number, including extension
  - » Work cell phone number
- Email
  - » Work
  - » Personal
- Home Address
  - » Entire street address in one field, including apartment
  - » City, state and postal code (either five or nine digit), each in individual fields
  - » Rural route information
  - » Gated community, apartment complex name and codes for entry
- Mailing Address
- Other
  - » Gender
  - » Spouse's name
  - » Date of birth
  - » Relationship to others in unit
  - » Ethnicity
- Tests
  - » Date
  - » Comments
- Contacts
  - » Date
  - » Assessments
  - » Comments
- Assessments
  - » Committee member
  - » Other volunteer activity
  - » Leader
  - » Membership status
  - » Card signer (with date)
  - » Comments
  - » Contacts
- Issues
  - » List (drop-down preferable)
  - » Comments

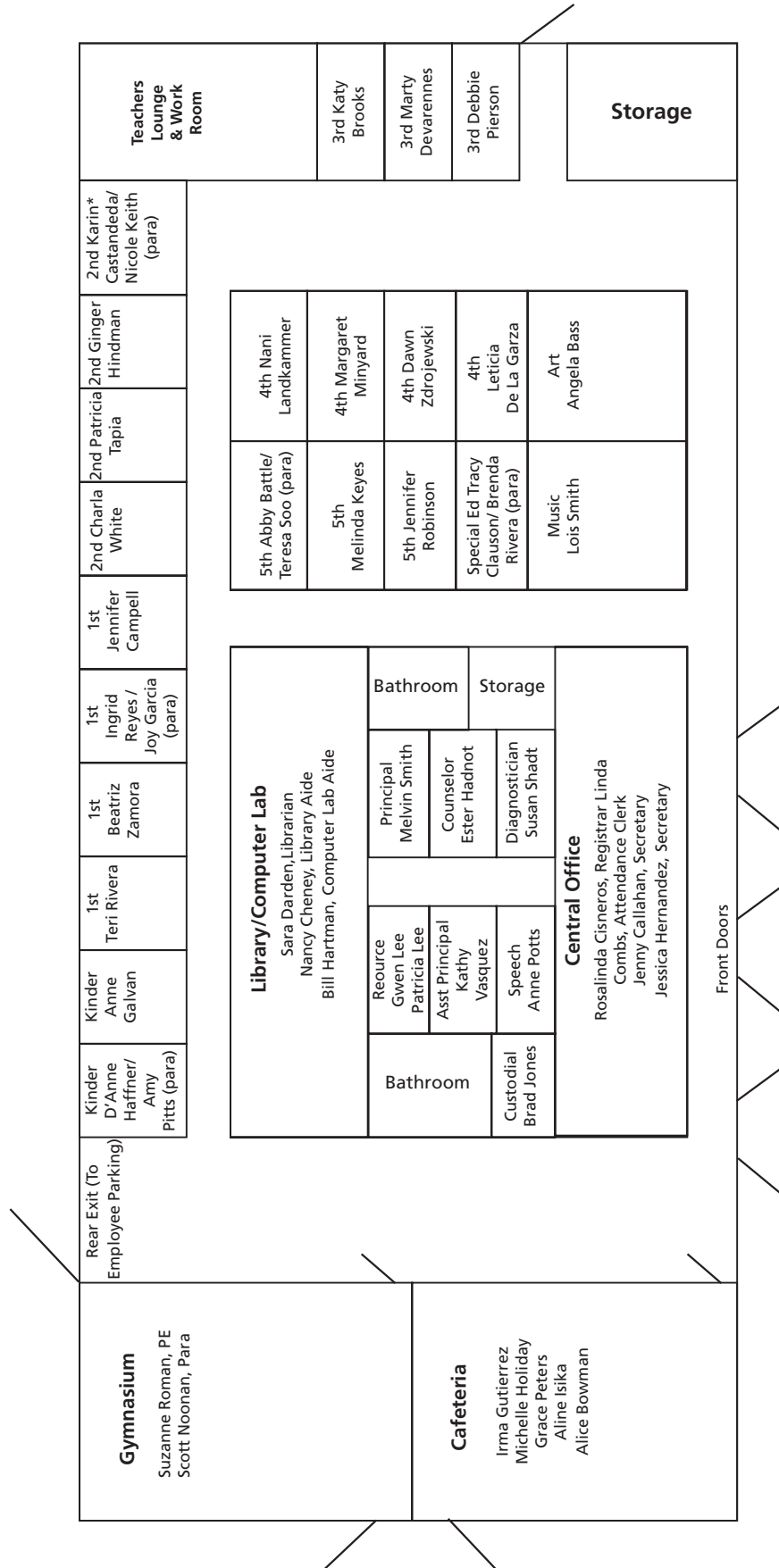
# Membership List – Teachers/PSRPs

## HANDOUT 4-2

Name	Job Title	Grade	Member	Leader	Issue	Comments
Joy Garcia	Para	1st	Fair share		Health Ins	
Anne Galvan	Teacher	1st	AFT		Testing	Best friends with Debbie Pierson
Teri Rivera	Teacher	1st	AFT	YES		
Beatriz Zamora	Teacher	1st	AFT			
Ingrid Reyes	Teacher	1st	Fair share		Health Ins	
Jennifer Campbell	Teacher	1st	AFT		Salary	
Charla White	Teacher	2nd	Fair Share			
Patricia Tapia	Teacher	2nd	AFT		Health Ins	Part of the "lounge lizards" (leader)
Ginger Hindman	Teacher	2nd	AFT		Testing	Part of the "lounge lizards"
Karin Castaneda	Teacher	2nd	AFT	YES	Health Ins	Part of the "lounge lizards"
Katy Brooks	Teacher	3rd	AFT		Testing	
Marty Devarenes	Teacher	3rd	Fair share		Testing	
Debbie Pierson	Teacher	3rd	Fair share		Health Ins	Best friends with Anne Galvan
Nani Landkammer	Teacher	4th	AFT	YES		
Margaret Minyard	Teacher	4th	AFT		Testing	Rides with Patricia Tapia to school
Dawn Zdrojewske	Teacher	4th	Fair share		Salary	
Leticia De La Garza	Teacher	4th	Fair share		Health Ins	
Teresa Soo	Para	5th				Other paras come to her w/problems
Abby Battle	Teacher	5th			Testing	
Melinda Keys	Teacher	5th			Testing	
Jennifer Robinson	Teacher	5th				
Angela Bass	Teacher	Art	Fair Share		Health Ins	Very social/plans lounge lunches
Amy Pitts	Para	Kndg	Fair share		Health Ins	
D'Anne Hafner	Teacher	Kndg	Fair share			
Bill Hartman	Computer lab	Library	Fair share			
Sara Darden	Librarian	Library	AFT			Respected by her colleagues (leader)
Nancy Cheney	Library Aide	Library	AFT	YES	Health Ins	
Lois Smith	Teacher	Music	Fair share		Salary	
Linda Combs	Attendance	Office	Fair share		Safety	Most senior/other secs look to her
Ester Hadnot	Counselor	Office	AFT		Health Ins	
Rosalinda Cisneros	Registrar	Office	Fair share		Safety	
Jenny Callahan	Secretary	Office	Fair share		Salary	
Jessica Hernandez	Secretary	Office	AFT			
Scott Noonan	Para	PE	Fair share		Health Ins	
Suzanne Roman	Teacher	PE	AFT	YES		Part of the "lounge lizards"
Susan Shadt	Diagnostician	Special Ed	AFT			Famous for after-work BBQs
Brenda Rivera	Para	Special Ed	Fair share		Health Ins	
Gwen Lee	Resource Tchr	Special Ed	Fair share		IDEA	
Patricia Lee	Resource Tchr	Special Ed	Fair share		IDEA	
Anne Potts	Speech	Special Ed	Fair share		Health Ins	
Tracy Clauson	Teacher	Special Ed	Fair share		IDEA	
Brad Jones	Custodian		Fair share		Health Ins	
Irma Gutierrez	Food Srvc Wkr		Fair share		Safety	
Michelle Holiday	Food Srvc Wrr		AFT	YES		Respected by her colleagues (leader)
Grace Peters	Food Srvc Wkr		AFT		Safety	Husband is best friends w/Brad Jones
Aline Isika	Food Srvc Wkr	AFT			Health Ins	
Alice Bowman	Food Srvc Wkrr	Fair share			Safety	

# Work-Site Map – School

## HANDOUT 4-3



# Membership List – Public Employees

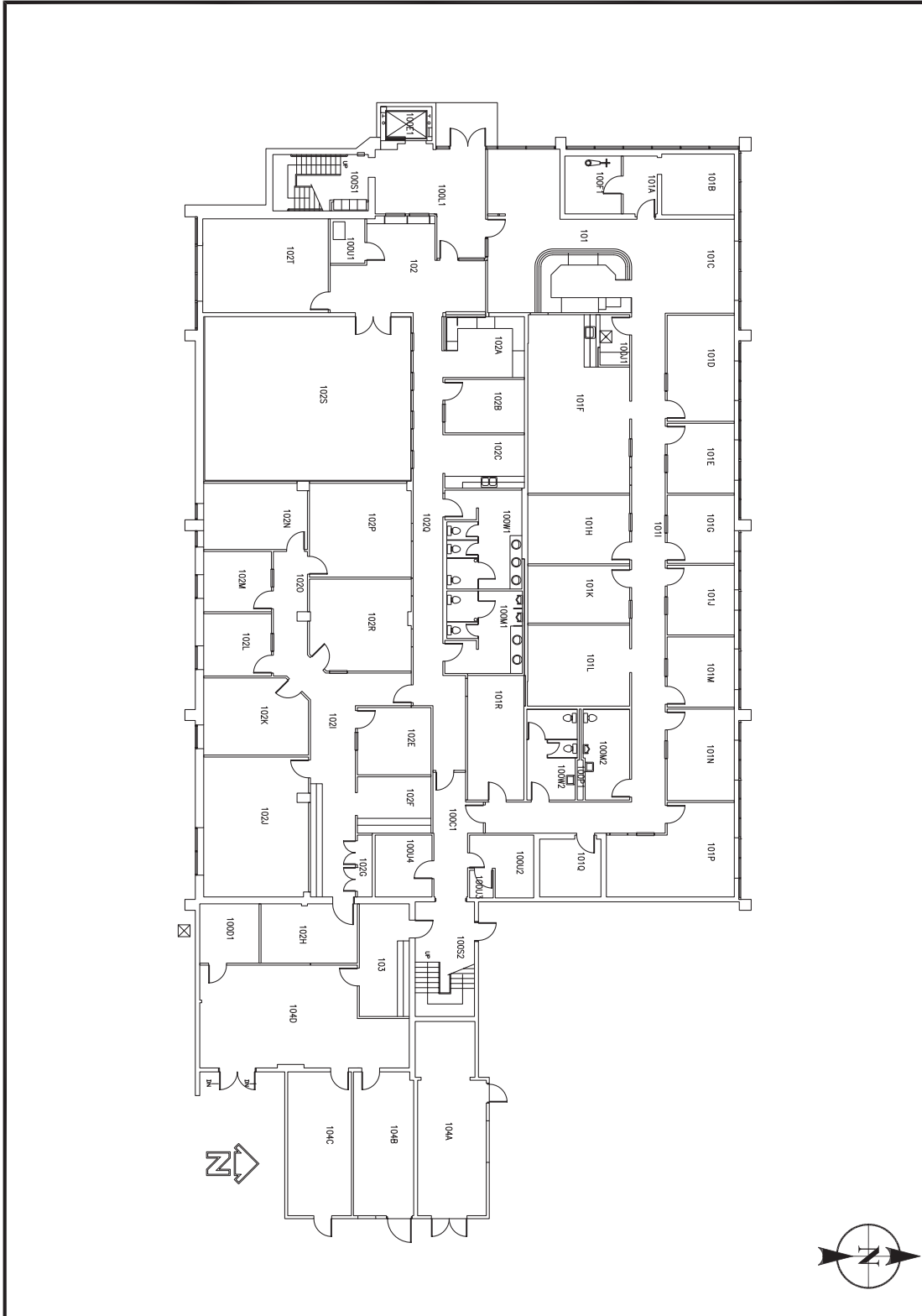
## HANDOUT 4-4

Worksite Name	Last Name	Middle Name	First Name	Work Department	Job Title	Work Location	Member	Assess
Bragaw Office Building	Young	Marie	Hope	State Land Department	Appraiser	101N		3
Bragaw Office Building	Spry	P	Nelson	State Land Department	Appraiser	102F	Yes	2
Bragaw Office Building	Selhay	V	Yelena	State Land Department	Assistant Manager	102N		
Bragaw Office Building	Fitchett	L	Erica	State Land Department	Asst. Real Estate Project Leader	102P	Yes	2
Bragaw Office Building	Choquette	J Cashell	Tami	State Land Department	Executive Assistant	103	Yes	2
Bragaw Office Building	Abbott		Jennifer	State Land Department	Fiscal Analyst	101M		
Bragaw Office Building	Willis	T	Lynette	State Land Department	Fiscal Manager	101B	Yes	3
Bragaw Office Building	Spencer	Ellen	Deborah	State Land Department	Fiscal Technician	101D	Yes	2
Bragaw Office Building	Saelee	Ian	May	State Land Department	Fiscal Technician	102B		3
Bragaw Office Building	Kilanowski	J	Gerald	State Land Department	Forest Engineer	101H		
Bragaw Office Building	Gichard	Renee	Amber	State Land Department	Forest Management Specialist	102P		
Bragaw Office Building	Collier	A	Cathryn	State Land Department	IT Analyst	102H		4
Bragaw Office Building	Jeter	C	Timothy	State Land Department	IT Developer	102E		
Bragaw Office Building	Vannoy	T	Brenda	State Land Department	Lead Water Rights Specialist	104D		
Bragaw Office Building	Resnick	Michael	Joshua	State Land Department	Leasing Agent I	101K		

Worksite Name	Last Name	Middle	First Name	Work Department	Job Title	Work Location	Member	Assess
Bragaw Office Building	Musgrove	Anne	Jessica	State Land Department	Leasing Agent II	101L		
Bragaw Office Building	York	D	Deshana	State Land Department	Manager	102J	Yes	1
Bragaw Office Building	Rowe	C	Bruce	State Land Department	Manager	102T	Yes	2
Bragaw Office Building	Levesque	Lee	Brenda	State Land Department	Planner	101R	Yes	2
Bragaw Office Building	Markova	Petrovna	Elena	State Land Department	Planner	102R		
Bragaw Office Building	Takak Jr	Carl	Peter	State Land Department	Property Analyst	101Q		
Bragaw Office Building	Anderson		Al	State Land Department	Property Manager	101P	Yes	2
Bragaw Office Building	Wilson	Jo	Patricia	State Land Department	Real Estate Project Leader	102K		
Bragaw Office Building	Singer	A	Elizabeth	State Land Department	Real Estate Technician	101J		3
Bragaw Office Building	Carmack	M	Laura	State Land Department	Real Property Specialist	101E		
Bragaw Office Building	Crews	Marie	Jean	State Land Department	Real Property Specialist	101G	Yes	2
Bragaw Office Building	Sakumoto	S	Anne	State Land Department	Training Director	101F		
Bragaw Office Building	Carlson	Monique	Courtney	State Land Department	Water Management Specialist	102 N	Yes	2
Bragaw Office Building	Smith	D	Jim	State Land Department	Water Rights Specialist I	104A		

# Work-Site Map—Public Agency

## HANDOUT 4-5



**UNIVERSITY of ALASKA ANCHORAGE**  
**OFFICE OF FACILITIES PLANNING,**  
**AND CONSTRUCTION**  
 3890 University Lake Drive, Suite 110  
 Anchorage, AK 99508



Updated By: TLNelson  
 Date Updated: 8-27-08  
 Printed By: TLNelson  
 Date Printed: 8-27-08  
 Scale: 1"=15'-0"  
 Sheet 1 of 2 Sheets

**BRAGAW OFFICE BUILDING**  
**FIRST FLOOR**

BUILDING NO.: AL128

**ANCHORAGE LEASE SPACE**  
 1815 BRAGAW ST.  
 ANCHORAGE, ALASKA 99508

# The Work-Site Structure

---

## INSTRUCTOR NOTES

### Instructional Objectives

- Work-site leaders will determine if their work site has sufficient resources (people) to sustain a strong and effective union structure.
- Identify the number of work-site activists needed for an effective work-site structure to build communication channels that support information sharing, union building and problem solving.

### Resource and Reference Materials

- » Handout 5-1: Work-Site Structure Chart
- » Handout 5-2: Roles and Responsibilities
- » Handout 5-3: How Many People Do We Need?

### Instructor Directions

1. **Review** Handout 5-1: Work-Site Structure Chart.

**Discuss** the major features so that everyone understands how the structure should be organized. **Make note that the ratio of leaders to members is critical to an effective work-site structure.**

- Leaders and activists are an integral component of effective work sites.
- Every work site should have:

**One work-site leader for every 10 workers—1:10.**

**Distribute** Handout 5-2: Roles and Responsibilities.

**Answer** any questions from the group.

2. **Consider** the recommended structure and use your current membership data, mapping and charting to record the information on Handout 5-3: How Many People Do We Need? This will help determine if there are enough leaders and activists at your work site to carry out one-on-one conversations.

3. Upon completion of step 2 in this process, discuss and answer the following questions:

A. If there aren't enough work-site leaders and activists (based on the suggested ratios), where can additional people be recruited?

Questions to ask:

- Who are the leaders?
- Who do people respect?
- Who organizes workplace events and/or charity drives?
- Who do people go to for advice?
- Who stands up for what they believe is right or is willing to take on issues?

B. What are the ideal times and places for contacting each worker?

C. Who will contact the potential leaders and when? (Be specific and set timelines for contacting the potential leaders and reporting back on the conversations.)

D. How many education/training sessions are needed to prepare work-site leaders and activists to do their jobs? When should these sessions be scheduled? (Work-site trainings should be regularly scheduled and posted on but can be provided as needed and on an individual basis.)

E. Who should be involved in the development, preparation and implementation of training, including educational/training materials, logistics and leaflets?

#### 4. **Summary and Close**

**State or paraphrase** the follow points:

We must get members active in our union now, and we must also educate them about any attacks the local is facing. Having enough work-site activists readily available to implement an effective communication and mobilization program is key to strengthening your union in order to overcome current challenges.

**Answer** any questions from the group.



# Work-Site Structure Chart

HANDOUT 5-1



# Roles and Responsibilities

---

## HANDOUT 5-2

**Local Representative:** A union officer, staff representative or other person who is assigned to a work site to work with union members. The local representative works with and supports the work of the work-site leaders and activists to ensure that communication through face-to-face conversations are being carried out throughout the building.

The local representative provides structure and support to the work-site leaders with training, planning and implementation of work-site programs and actions.

**Work-Site Leaders:** Union officers, chief stewards/building reps and/or other work-site leaders. They are responsible for recruiting other leaders and activists to help build structure and strength in the work site. The work-site leader leads members in addressing workplace and union issues via face-to-face conversations and other workplace actions. They should attend education/training sessions that focus on work-site and communication structures, including the recruitment of volunteers. It is also the responsibility of the work-site leader to engage members through training and work-site meetings. They track union membership, issues and actions, and report them to the local representative.

**Work-Site Activists:** Members who are actively engaged in their workplace and union. They recruit and mobilize members via face-to-face conversations and provide assistance and support for workplace actions and meetings.

Activists should attend an education/training session on work-site structure, mobilizations and tactics.

**Members:** Workers who may or may not be active in their union. They are kept up to date via one-on-one conversations and other union communications. All active and non-active members will be contacted about workplace and/or union issues and asked to take the designated action steps.

# Roles and Responsibilities

---

## HANDOUT 5-3

Identify Local Union: \_\_\_\_\_

Work-Site or Employer: \_\_\_\_\_

---

1. Provide the following information and perform the necessary calculations:

A. Number of people in the work site or building \_\_\_\_\_

B. Number of people organized (i.e., how many are union members?) \_\_\_\_\_

C. Number of work-site leaders/ reps needed \_\_\_\_\_

(calculate by dividing your answer to B by 10) \_\_\_\_\_

2. Look at your current steward/work-site rep structure and indicate or estimate the following:

D. Number of stewards/work-site leaders/building reps \_\_\_\_\_

E. Number of assistant stewards/ reps (if applicable) \_\_\_\_\_

F. Number of active members, leaders or activists \_\_\_\_\_

**Total Potential Work-Site Activists (D + E + F)** \_\_\_\_\_

G. From the total above, how many potential activists can you actually count on? \_\_\_\_\_

Compare answer G to the requirement in C. This will let you know if you have enough work-site activists readily available to implement an effective member engagement and mobilization program.



# Appendix 1

---

## Member Engagement Tools

Contract Report Form

Work-Site Conversation Debrief Form

Reclaim the Promise Rap Sample

Member Engagement Phone Bank Script

Member Engagement Planning Template



# Contact Report Form

Leader/Activist: \_\_\_\_\_ Date: \_\_\_\_\_

Work Site: \_\_\_\_\_

Return This Form To: \_\_\_\_\_

Worker Name: \_\_\_\_\_ Years of Service: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone:

Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

Personal Email: \_\_\_\_\_

Worker:  Member  New Employee  Fee Payer  Joined

Issues/Workplace Concerns:

Notes:

- 1.
- 2.
- 3.

Joined the Union:  Yes  No

Assignment/Follow-Up:

- Date of Follow-Up Assignment: \_\_\_\_\_
- Name of Person Following Up: \_\_\_\_\_

Comments



Leadership Education and Development

## Work-Site Conversation Debrief Form

Work Site: \_\_\_\_\_ Activist/Leader: \_\_\_\_\_ Week Ending: \_\_\_\_\_

Name	Non-Member Type		Member Assessment				COPE	Issues
	New	Fee Payer Y/N	Joined Y/N	1	2	3		

## Instructions for Tracking Our Progress

---

Use the contact report form and the conversation debrief form to help track our progress and plan next steps as we sign up and activate more members in our union.

1. If an activist accepts an assignment to talk to other members to engage and activate them, the person should receive a list of people to contact and contact report forms. These forms are used to help track conversations and to assess and capture various benchmarks.
2. Activists should return completed contact forms to a work-site leader.
3. Work-site leaders use conversation debrief forms to keep track of their conversations and those of the activists.
4. Local representatives collect or make copies of all contact and debrief forms, tally up all the numbers and submit them weekly to the local union, state federation and/or AFT. Use these two forms to help track our progress and plan next steps as we sign up and activate more members in our union.





# Reclaiming the Promise Rap

---

## Sample

### 1. Introduction to the campaign

- Introduce yourself – It might be old news to you but it grounds the conversation about our movement to tell them not just your name, job, but also your role in the union.
- Introduce the campaign – Campaign to reclaim economic, racial and educational opportunity in our country.
- From Boston to LA and Miami to Seattle the 1 percent have taken care of themselves and have left the rest of us hanging out to dry. (Share a couple of examples)
  1. Increased income inequality stretch our wallets and those we serve—kids, parents, patients, etc.—denying secure and good jobs, retirement, and (give a specific example in local community)
  2. Racially segregate our cities and denied equal opportunities for all people, regardless of race, to quality education, healthy and safe communities, and good jobs. (give a specific example in local community)
  3. Made college and early childhood education unaffordable for most families and students and forced others take on immense debt.
  4. Slashing state and local budgets so they can't support vital services (give specific example in the community.)
  5. Denied equal participation in our electoral system (use state or local example).

### 2. Ask them their story

Where and how do you see inequalities/injustices in your workplace, community or country?

### 3. Give the plan

- The inequalities you've seen here in our community are happening all around the country, and communities everywhere are fighting back. There are thousands of local unions like ours that have decided to have this same conversation with members and community stakeholders.



## Reclaiming the Promise Rap

---

### Sample

This same conversation is happening more than 10,000 times a week across the country.

Imagine the power 1.6 million members and our community stakeholders have when we come together as individuals, local unions and community groups through collective action and reclaim equal opportunity.

- Here in \_\_\_\_\_ (your city or state), union and community members are already organizing to create equal opportunity to \_\_\_\_\_, and now we are asking each other what else we want to achieve here and what we are all willing to do to support change across our country.

### 4. The Ask

The first step we are taking with members across the country is to ask you what you want to see improved and what should we do to win it.

- If you could change one thing in our workplace, community or country, what would it be?
- (Help each person you talk to fill out a #ReclaimIt Pledge Card.
- Ask them to attend any local events and let them know that they should be receiving an email inviting them to the national, state and/or local campaign.

### 5. Closing

## Member Engagement Phone Bank Script

---

### Sample

Hello, may I speak with \_\_\_\_\_?

My name is \_\_\_\_\_, and I am calling with (your local).

We are making calls to all of our members to talk about our campaign to reclaim economic, racial and educational opportunity in our community, and to combat those who wish to undermine unions and the work we do.

- From Boston to LA and Miami to Seattle the 1 percent have taken care of themselves and left the rest of us hanging out to dry. (share a couple examples)
  - Increased income inequality stretch our wallets and those we serve – kids, parents, patients, etc. – denying secure and good jobs, retirement, and (give a specific example in local community)
  - Racially segregate our cities and denied equal opportunities for all people, regardless of race, to quality education, healthy and safe communities, and good jobs. (give a specific example in local community)
  - Made college and early childhood education unaffordable for most families and students and forced others take on immense debt.
  - Slashing state and local budgets so they can't support vital services (give specific example in the community.)
  - Denied equal participation in our electoral system (use state or local example).

**Ask** them their story. “Where and how do you see inequalities or injustices in (workplace, community, state.)?”

### Give the Plan

- The inequalities you've seen here in your community are happening all around the country, and communities everywhere are fighting back. There are thousands of local unions like ours that have decided to have this same conversation with members, like you, and community stakeholders. This same conversation is happening over 10,000 plus times a week across the country. Imagine the power 1.6 million members and our community stakeholders have when we come together as individuals, local unions and community groups through collective action and reclaim equal opportunity.



## Member Engagement Phone Bank Script

---

- Here in (your city or state), union and community members are already organizing to create equal opportunity to \_\_\_\_\_, and now we are asking each other what else do we want to improve and what we should do to achieve it.
  - The first step we are taking with members across the country is to ask you what you want to see improved and what should we do to win it.

**Ask** "If you could change one thing in our workplace, community or country, what would it be?"

**Ask** "Are you ready to stand with your colleagues and sign a pledge to support our campaign?"

*With the card in front of you, confirm the personal information you have on your data sheet: name, mailing address, phone number, email, etc. If any of that information is missing, get that information (right now) from the member/potential-member.*

**Say** "I am now going to read through a list of actions that others are taking to support this campaign."

**Read** each applicable action and ask if the member/potential member is ready to take that action.

Now you need their signature. **Ask** the member/potential member for a specific time and place where he or she can meet either you or another activist to sign the pledge card.

**Write** down the place, date and time of the appointment on the corner of the card, and hand the card over to the phone bank coordinator after the call.

Also, with the person's personal information in front of you, confirm the name, mailing address and email. If any of that information is missing, please ask for it.



## Member Engagement Planning Basics

*Make member engagement and union-building part of everything we do as a union.*

Regardless of the specifics of our campaigns, building relationships is the most important part of our work. When we strengthen the relationships that bind us to each other, we make our union stronger.

Relationships start with conversations. Your campaign plan (no doubt) already assumes a lot of conversations will take place. But we can strengthen our hand right now, and strengthen our union over the long run, if we make an extraordinary effort to systematically involve all our members in conversation about our goals as a union. With help from the executive board, building representatives, activists, and whoever else is willing, **how many conversations can we conduct (and document) during this phase of our outreach? How many member organizers will we identify and recruit to help us with this work?**

Number of conversations (total): \_\_\_\_\_

Number of member organizers (total): \_\_\_\_\_

**What sort of training will need to provide to facilitate these conversations?**

*Be specific - who will do which task, and when will it be done?*

Is there a campaign or issue that your local is working on? A political, contract or legislative fight? **Identify and issue and/or campaign. Develop a message around your issue or campaign.**

When members take action in support of the union community, it helps us get the work done, and also forges a deeper connection among union members and colleagues. **What relatively simple yet constructive action do we want members and potential members to take?** *Remember to focus on actions that we can document, that lead to conversations, and that build relationships among members.*

**What sort of preparation or training will members and potential members need in order to be able to take action? How can we provide it?**

*Be specific - who will do which task, and when will it be done?*

Building representatives (or stewards) provide crucial worksite leadership. **List the worksites where immediate attention to worksite structure is needed. How many member organizers do we need in each worksite?**

Worksite leaders are often willing to do more than they currently do, but they lack the skills to organize and lead. To reach our goals, conduct these conversations, lead members into action, and build the relationships that bind our union, we need to develop the building rep structure. **What training can we provide to worksite leaders?**

*Be specific - who will do which task, and when will it be done?*

**As union leaders, how do we nurture the building rep structure across the union?**

*Be specific - who will do which task, and when will it be done?*

We need the best, most current knowledge of who we are as a community. We all have a role to play in creating up-to-date maps of the worksites. These maps should help us find those we need to talk to (potential members), and indicate who ought to initiate those conversations. These same maps may also help us identify natural worksite leaders. **How will we create and update maps and charts of all our worksites?**

*Be specific - who will do which task, and when will it be done?*

**Agency Fee Considerations**

Do the agency-fee numbers in our union suggest a vulnerability that our opponents may use against us? If so, we need to take action.

How many agency-fee payers are there in our unit? \_\_\_\_\_

How many will we speak to? \_\_\_\_\_

We expect how many to join? \_\_\_\_\_

How many is there per week? \_\_\_\_\_

Often potential members default into agency-fee status when they are hired. **How can we get further involved in the new employee orientation process so that new employees are eager to join our union?**

*Be specific - who will do which task, and when will it be done?*



# Appendix 2

---

Mobile Toolkit Training Guide

Mobile Toolkit Training Guide

**Mobile Toolkit**  
**Worksite Leader**  
**Training Guide**



*A Union of Professionals*

**Information Technology**

## Table of Contents

Introduction.....	2
New Users .....	2
Accessing Mobile Toolkit.....	2
Mobile Toolkit Home Page.....	3
Searching for Records .....	4
Search Results.....	5
Accessing Individual Records.....	7
Contact Information .....	7
Edit Contact Information .....	7
Employment Information .....	8
Quick Comments .....	8
Assessments.....	9
My Account Tab.....	10

## Introduction

Mobile Toolkit for Worksite Leaders is an easy to use application which will be very helpful in your work. With Mobile Toolkit, you will be able to:

- Search for records of members and potential members by first and/or last name.
- Add and edit phone and e-mail contact information.
- Enter comments and assessment data.

Mobile Toolkit allows you to perform your work from any smartphone, tablet, personal computer, laptop, or Mac as long as the device has an Internet connection. Depending on the device you are using and the size of the web browser the layout will change, however you will always have the same options.

## New Users

You will receive an e-mail when a Mobile Toolkit Worksite Leader Admin creates an account for you. Follow the instructions in the email to login to Mobile Toolkit and create your password. The e-mail address used will also be your login name to Mobile Toolkit. If you do not see the e-mail, check your junk/spam folder. If the e-mail is not there, have the person who created the account confirm the e-mail used. If necessary, have them delete the wrong account and create a new one.

## Accessing Mobile Toolkit

1. In your browser enter the URL <http://mobiletoolkit.aft.org>.
2. Enter your User ID and Password.
3. Click on the Log in button.
4. The **Submit Feedback** link appears at the bottom of all pages in the application. Please use the link to provide feedback on your experiences with the Mobile Toolkit.

When logging in using an **iPhone** or **iPad**, you may be asked if you want to add an icon to your desktop. Adding this icon will eliminate the need to type the URL each time you want to access the application.

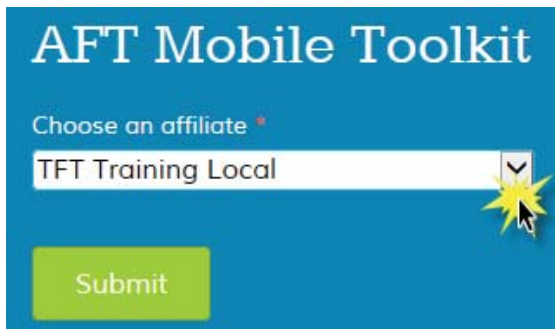
When logging in using an **Android** based phone or tablet, you can use the "add a shortcut to home" to add the Mobile Toolkit icon to your home page.



When logging in using a personal computer, laptop, or Mac, add the URL to your favorites or bookmarks.

## Mobile Toolkit Home Page

The Mobile Toolkit home page displays the name of the local you have access to, based on your log in permissions. If you have been granted access to multiple locals, you will be able to select the local you would like to work with from this page.



The Mobile Toolkit home page also provides access to the application's main menu. Clicking the **MENU** button will display the following options:

**Home:** Returns you to the home page.

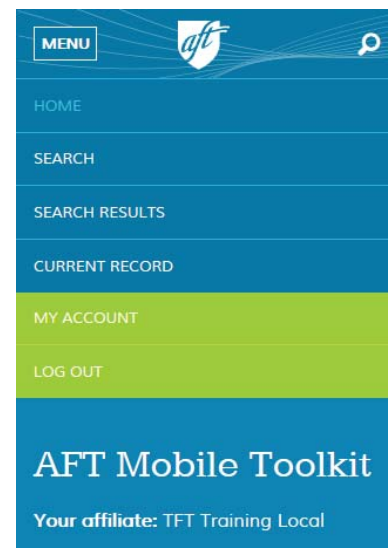
**Search:** Opens the search form.

**Search Results:** Displays the most recent search results.

**Current Record:** Displays the most recent record accessed by you.

**My Account:** Provides basic information about your account.

**Log Out:** Logs you out of the application.



\*\* If you are using a computer with the web browser expanded fully, the menu option will be at the top of the page.

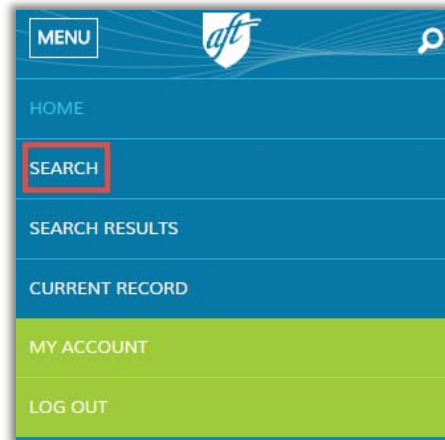




## AFT Mobile Toolkit

### Searching for Records

Selecting the **SEARCH** option will open the search page and allow you to begin a search for an individual record or a set of records.




Within the Mobile Toolkit, you can search using the following fields:

- **Last Name** (it is required that you put in at least three characters in the Last Name field to be able to perform a search)
- **First Name**


Click the **Search** button to display the search results.

## Search Results

### Search Results

SEARCH FORM 

Found 3 results.

Sort by  

#### Bart Smith

MEMBER: Yes  
WORKSITE: Heritage High school  
DUES CATEGORY: Eighth Agency Fee Non Member  
EMPLOYER: Galesburg School District

#### Bobbi Smith

MEMBER: Yes  
WORKSITE: Heritage Elementary School  
HOME EMAIL: testSmith@aft.org  
WORK EMAIL: testBobbi@aft.org  
WORK PHONE: (313)565-1787  
MOBILE PHONE: (555)555-5555  
LAST ASSESSMENT VALUE: 1  
DUES CATEGORY: Full Dues  
EMPLOYER: University of New Columbia

#### Brian Smith

MEMBER: Yes  
LAST ASSESSMENT VALUE: 1  
DUES CATEGORY: Eighth Agency Fee Non Member  
EMPLOYER: United Health Group

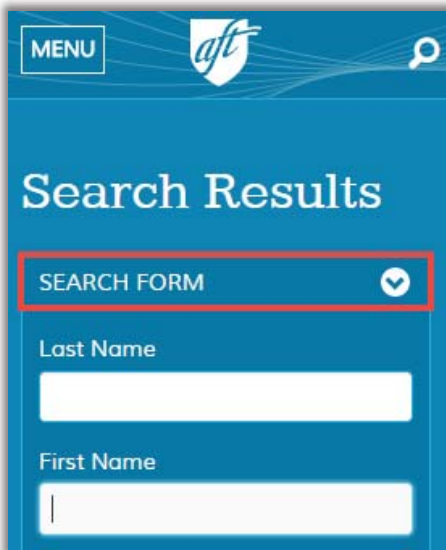
The search results will contain records that matched the search criteria.

The information displayed within each record includes:

- First Name
- Last Name
- Member – Yes/No
- Worksite
- E-mail Address
- Telephone Number
- Last Assessment Value
- AFT Dues Category
- Employer

**Note:** If a record does not contain data for one of the above fields, the field will not be displayed in the search results.

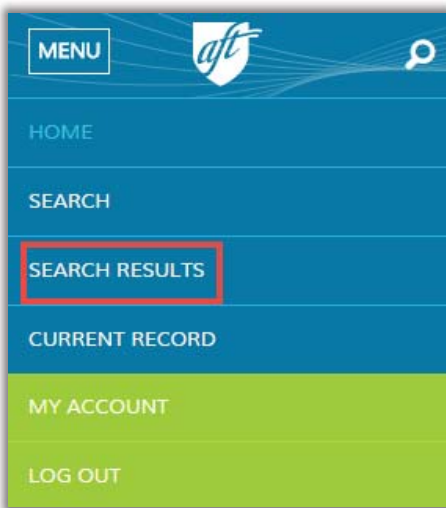
The search results will display the first 25 records that match the search criteria. If there are more than 25 records that match the search criteria, the page through option will appear at the bottom of the search results list. Clicking on an individual's name will open the individual's record.



Selecting the **SEARCH FORM** option located at the top of the **Search Results** page allows for the modification of the original search criteria without having to retype all of the information associated with the original search.

When using the application, you can, at any point, return to the most recent search results by selecting the **SEARCH RESULTS** option from the main menu.

**Note:** This feature can be extremely useful when working with a list of individuals and needing to go back to the results without completing the search again.





## Accessing Individual Records

Selecting an individual record from within the search results allows you to view/edit contact information, view employment information and view/add quick comments and/or assessments for that individual.

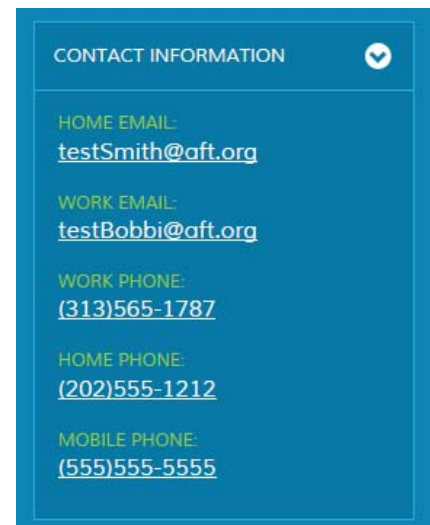


- **Contact Information**
- **Employment Information**
- **Quick Comments**
- **Assessments**

Selecting **Contact Information** opens the individual's record allowing you to view or edit contact information.

## Contact Information

- Clicking on an **e-mail address** options allows you to send an e-mail to the selected address.
- If you are on a smartphone, clicking on the **telephone number** options will initiate a call.



## Edit Contact Information

- Clicking the **Edit** link, located near the top of the individual record, will allow you to edit the contact information.



## Employment Information

Selecting **EMPLOYMENT INFORMATION** allows you to view details pertaining to employment information.

EMPLOYMENT INFORMATION

MEMBER:  
Yes

AFT DUES CATEGORY:  
Full Dues

EMPLOYER NAME:  
University of New Columbia

CHAPTER:  
Unit A

WORKSITE:  
Heritage Elementary School

DEPARTMENT:  
Science Department

AFT JOB CLASSIFICATION:  
Mechanics

LOCAL JOB CLASSIFICATION:  
Teacher, VIS

## Quick Comments

**QUICK COMMENTS** allows you to do the following:

- Record a rating or assessment value and a comment pertaining to the selected individual.
- View a running history of all quick comments that have been entered for the selected record.

**Note:** If no comments have been associated with a record, the **Add Quick Comment** option will appear instead of the **Quick Comments** option.

Click the **Add Quick Comment** button to enter the assessment value and comment.

+ Add quick comment

Bobbi Smith [Edit](#)

Local: Orgtx

CONTACT INFORMATION

EMPLOYMENT INFORMATION

QUICK COMMENTS

ASSESSMENTS

Enter the **Rating** (optional) and the **Comment** (required).

**Note:** The application will automatically record you as the organizer who collected the information and the date and time the information was entered.

Clicking the save button will associate the rating and comment with the selected record.

The comment was added.

## Assessments

The **ASSESSMENTS** option displays all Assessment and Analysis (A&A) Tool assessments that are associated with the selected record. You can complete an assessment or view the most recently completed assessment.

To complete an assessment:

- Click on the new button.
- Complete the form.
- Click the save button.

Assessments that have been completed will show the date and time the assessment was completed. To view the last assessment, click on the date and time. You can complete a new assessment by clicking on the **New** button.

## My Account Tab

The My Account section has two tabs: View and Edit.

The **View tab** allows the user to view the username/e-mail and the users' actual name.



testingAFT@gmail.com

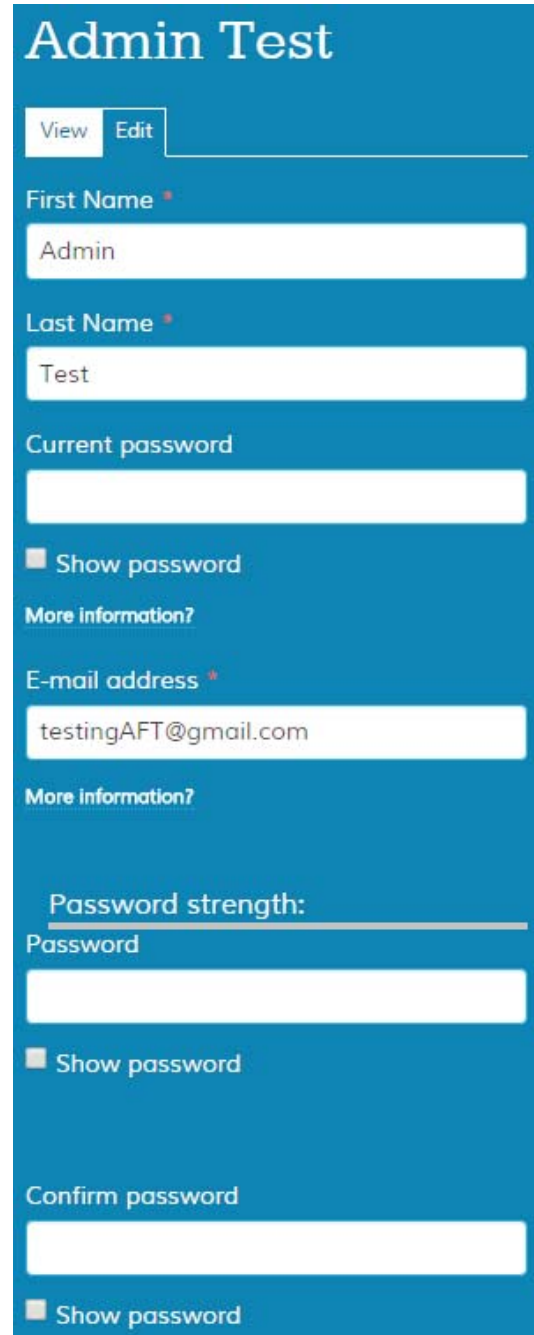
View Edit

First Name:  
Admin

Last Name:  
Test

The **Edit Tab** allows the user to edit or update the individuals name and/or password.

Click **Save** whenever you make any changes.



Admin Test

View Edit

First Name \*

Admin

Last Name \*

Test

Current password

Show password

More information?

E-mail address \*

testingAFT@gmail.com

More information?

Password strength:

Password

Show password

Confirm password

Show password

# Appendix 3

---

## Agency Fee Conversation Guide

Agency Fee Conversation Guide



# AFT Fair Share (Agency Fee) Training

## Note to facilitators

*We are so glad you are going to lead this training for union activists and members! Together, we are going to protect our union, the middle class and the many vital services we provide to our communities.*

This curriculum is meant to be edited with local or campaign-specific information in it, so it can be most helpful to you in motivating and activating local activists and members. Feel free to adapt and edit these training materials as needed for your members.

## Resources/Reference Materials

- Handout 1: Fair Share Fact Sheet
- Handout 2: Paying Your Fair Share
- Handout 3: Glossary of Terms Crossword
- Handout 4: Background Information

## Other materials

- Video: “Why I Chip In for Dinner with my Friends”
- Video: “What Have American Unions Ever Done for Us”
- Projector and audio speakers, if possible (if they are unavailable and you are training a small group, simply use a laptop)

## Instructional Objective

This training has been developed to help our members and work-site leaders approach and talk with their co-workers about switching from fair share status to union membership.

Part	Title	Time Needed	Facilitator
1	Welcome and Introductions	10 min.	
2	Lecturette—Fair Share/Agency Fee	15 min.	
3	Show Video(s) and Brainstorm Reasons for Union Membership	15 min.	
4	Discussion: How to Talk with Nonmembers	10 min.	



*A Union of Professionals*

Leadership Education and Development



## Fair Share Fact Sheet

---

### Handout 1

#### What is fair share or agency fee?

In a unionized workplace, agency fee is a category of workers who choose not to join the union (whether they realize it or not) but who must pay a fee (ranging from a small fraction of what members pay in dues to almost as much as membership) to help cover their fair share of costs for negotiating a collective bargaining agreement. These nonmembers are “fair share” or “agency fee” payers.

- Agency fee payers are covered under the union-negotiated contract but don't, however, enjoy all the privileges of membership.
- They do not, for example, vote for union officers or vote to accept or reject their contract.
- They are also not eligible to take part in AFT-sponsored programs and member-only benefits.

**Activity:** Have the group spend five minutes brainstorming the following two questions: **How would the loss of agency fee affect the AFT, your state federation and your local? And how would the loss of agency fee affect you?** If the brainstorm fails to capture all the items listed below, please add them to the discussion.

#### How would the loss of agency fee affect the AFT, your state federation and your local?

- Representational activities curtailed or ended;
- Limited ability to defend our contract;
- No longer promoting union values and positions through member education;
- Less time for advocating for worker rights and safety; and
- Curtailing other activities championed by the membership and benefiting all workers in the unit.

Agency fees represent a significant amount of the revenue collected by our national, state and local unions. Without this money, many of our efforts will be curtailed.



## Fair Share Fact Sheet

---

### Handout 1 - continued

#### **How would the loss of agency fee affect you?**

A weakened union equals a weakened voice for workers.

Imagine having a weakened voice (or no voice) on:

- Health and safety;
- Conditions of your work;
- Quality of your work;
- Healthcare and retirement;
- Enforcement of your rights on the job, including leave and working hours; and
- Public discourse.



## Paying Your Fair Share

---

### Handout 2

#### Facilitated discussion: Fair share issue-based organizing

Use the term “fair share” and not our opponents’ language of “agency fee” to define this category of workers. By using our own language, we begin to recapture our vision and not fall victim to defining ourselves based on what others say.

#### Small-group exercise: Issue advocacy organizing campaign

Please watch and share one or both of the videos.

The first video explains why it is important that everyone contributes their fair share—whether at dinner with friends or with your co-workers in the union. Once workers in a given workplace choose union representation, the union becomes their exclusive representative and is required by law to represent their interests. This is true even if a worker chooses not to join the union and pay union dues.

<https://www.youtube.com/watch?v=Ed6llngzIfs>

The second video outlines the many contributions unions have made and continue to make to the American economy, culture and workplace.

<https://www.youtube.com/watch?v=iObqguaNDdA>

At the conclusion of the videos, please lead the group in a brainstorm to discover why some of our co-workers might be fair share payers instead of being members in our union.

Break the group into smaller groups of five. Each group should develop ways that can be used to move people from fair share to union membership. Participants will then practice overcoming each of the brainstormed reasons through conversation. The goal is to give everyone an opportunity to hone their one-on-one communication skills.



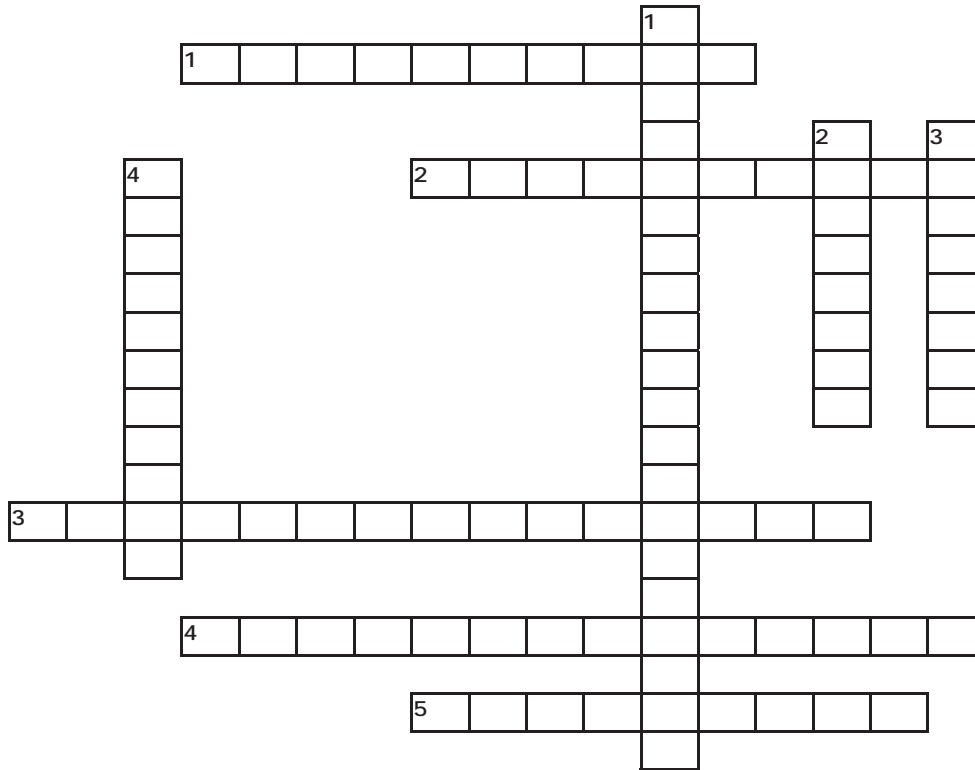
*A Union of Professionals*

Leadership Education and Development



# Glossary of Terms Crossword

## Handout 3



### ACROSS

1. A union security clause within a collective bargaining agreement under which all employees – both union members and non-members pay a service fee, as the equivalent of dues or an amount determined by law as a condition of employment. (2 WORDS)

Letters: **CNAYGE HPOS**

2. A union security clause within a collective bargaining agreement that obligates the employer to hire and employ only union members. This form of union security was declared illegal by the Taft-Hartley Act of 1947. (2 WORDS)

Letters: **ODLCSE HPOS**

3. A union that is the exclusive representative of all employees in a bargaining unit – bot union members and non-members. (2 WORDS)

Letters: **GGIINNAARB TGEAN**

4. A group of employees with related skills or common interests. (2 WORDS)

Letters: **GGIINNAARB NITU**

5. A union security clause that requires employees in a bargaining unit to join the union, within a certain time after they are hired, and maintain their membership as a condition of employment. (2 WORDS)

Letters: **NIUNO SOPH**



## Glossary of Terms Crossword

---

### Handout 3 - continued

#### DOWN

1. A method of determining hours, wages and working conditions by direct negotiations between representatives of the employer and union representatives of the employees. The results of the negotiations are set forth in an agreement, sometimes referred to as a "contract," which determines terms and conditions of employment for all workers in a bargaining unit. (2 WORDS)

Letters: TCVIEOLLC GGIIINNAARB

2. A clause in a collective bargaining agreement that allows for the employer to deduct – on behalf of the union – union dues or service fees from the paychecks of bargaining unit employees and to remit these funds to the union. (2 WORDS)

Letters: KCCEH FOF

3. A business establishment where union membership or agency fees are not required as a condition of employment. (2 WORDS)

Letters: EPON POSH

4. State laws prohibiting union shop clauses within collective bargaining agreements or any other union security arrangement that requires employees to join a union as a condition of retaining employment. The term has nothing to do with guaranteeing anyone the right to a job. (3 WORDS)

Letters: GHRIT OT ORKW



# Appendix 4

---

## Community Engagement Tools

Mock Community Rap

Tips for Effective Communication

The 5 Ws—Meetings

## Mock Community Visit

---

*(This is only a role-play, with CTU and CAC as stand-ins)*

**Union:** Cincinnati Teachers Union  
**Host:** *Community Allies for Change*

### Prelude to meeting

Start with small talk: "I really enjoyed the ride up here. Kenwood is a very beautiful community. I drove past a lovely community park and saw a lot of people there. Have you lived here long?"

*Connection you might have to neighborhood?*

"My high school friend attended Kenwood High; I came here for some basketball games."

"My uncle worked at the auto shop down the street."

"A while back I attended a community meeting at the United Church of Christ a few blocks away. Activists were trying to stop an incinerator from locating in the neighborhood."

---

### Part 1: The formal talk

"Again, thank you for agreeing to meet with us today, and for the warm welcome."

As I said on the phone, I'm a union steward for the Cincinnati Teachers Union; but I'm also a math teacher at Walnut Hills High School. I'm joined by two colleagues from the union—I'll let them introduce themselves...."

*The opening:* "We asked for this meeting because we realize that the unique challenges facing our schools cannot be addressed without community involvement. We believe real solutions will require strong community voices. But we also realize that communities are facing problems of their own, and that our union needs to do more to support local organizations, such as CAC, who are tackling those problems. So, we want to collaborate in addressing problems on both ends—in the schools and in the community. The fact is, these problems are connected. We cannot fix one without fixing the other."

---

**Part 2: Owning up to past mistakes:** "Before we go any further, we want to acknowledge that the union has not always been a good partner. We've made mistakes in our past relationships with the community (give example, if possible?). We want to make things right, if you will give us another opportunity to work together."

**[Pause, listen, let them talk/vent]**

*(Remember: Do not interrupt, don't get defensive, even if attacked)*

---





---

## Mock Community Visit

---

### Part 3: Eliciting their story

“We appreciate your honesty, and look forward to being a better partner....”

“We are primarily here to listen and learn from you today. You know, sometimes we look for so called ‘experts’ to fix our problems when the experts are right here in the community. Your work in this community has certainly earned you plenty of wisdom over the years. This time, we hope we can tap into that wisdom!”

#### *Questions you might ask them*

*(Remember, to build a relationship, we need to understand who they are and what motivates them—their **ISSUES**, **VALUES** and **INTERESTS**. Focus on host’s words; ask probing questions, but do not pry) – see attached “Tips for Effective Communication”*

#### Their **ISSUES**

“We know about CAC’s work, but would you mind giving us an overview? What are you working on now? What other **ISSUES** are you concerned about as a community leader? And are you involved in any of those issues outside your work with CAC?”

#### Their **VALUES**

“How did you get involved with CAC? You’re so passionate about these issues, what is it about them that gets you so excited? Have you always been this way?”

#### Their **INTERESTS**

“This seems like something you care about personally. Was there some event or experience that prompted you to be active?”

*(Remember, you can interject to get more from your host: Can you tell me more about that? Do you have other examples of that? How so? Why do you think that’s the case? Etc.)*

---

### Part 4: Our story, and what we want

“Thank you for sharing your very inspiring story.....  
Is “pitch” the right word.....it connotes “selling”.....can we come up with a better work.....our story?”



## Mock Community Visit

---

### Background

[Local] represents *X number* of teachers and staff in the school system, and the district has *X number* of students. Our schools continue to face serious challenges that undermine their ability to serve students. The problem has gotten worse in recent years with:

- Budget cuts that force teacher lay-offs and increase class size
- Attacks on collective bargaining that prevent teachers from negotiating for things like class size, restoration of arts, music and physical education programs that have been cut; and their working conditions
- And efforts to privatize our public schools

### Your local's message

Our goal as a union is to improve and strengthen our schools, ensure every child has the best teachers and best schools, teachers have the resources they need, and that their professional needs are met. We share a strong believe in social justice and in promoting healthy, livable communities. We believe strong communities are a key to successful schools.

### *Teachers' Issues are Student Issues*

"But we also want to make clear to community members that when teachers fight for a good contract, what they want affects students. When teachers' working conditions improve, the learning environment for students also improves. That is why we oppose budget cuts that cause teacher lay-offs, increased class size and wage and benefits cuts. We know that smaller class size enables teachers to give more attention to each student. And with better wages, teachers can concentrate on teaching, not their day-to-day survival. But with proposed budget cuts, that will not be possible. That's why collective bargaining is important, and why the community should be concerned."

### *Offering support*

"As we move forward in this new chapter, we first want to figure out how we can support your work. Maybe you can tell us where you think our efforts will be most valuable? The issues you mentioned—affordable housing, hunger and homelessness—are important to our union not just as a matter of social justice, but because they affect community stability."



## Mock Community Visit

---

We recognize that when families hurt, children struggle in school. But as communities do well, so do students. That's why our union wants to support your work. We can be stronger together."

---

### Part 5: Wrap-up and Next Steps

- Remember to designate someone from the union to be regular liaison.
- Ask if leader will always be contact person for community group, or if they will designate others.
- Ask if this is the best location for future meetings? Offer to always go where they prefer.
- Agree on regular schedule for future meetings: "Since we all have so much to do, should we consider a \_\_\_\_\_?"
- Regular schedule for future meetings?" How about meeting once a month?

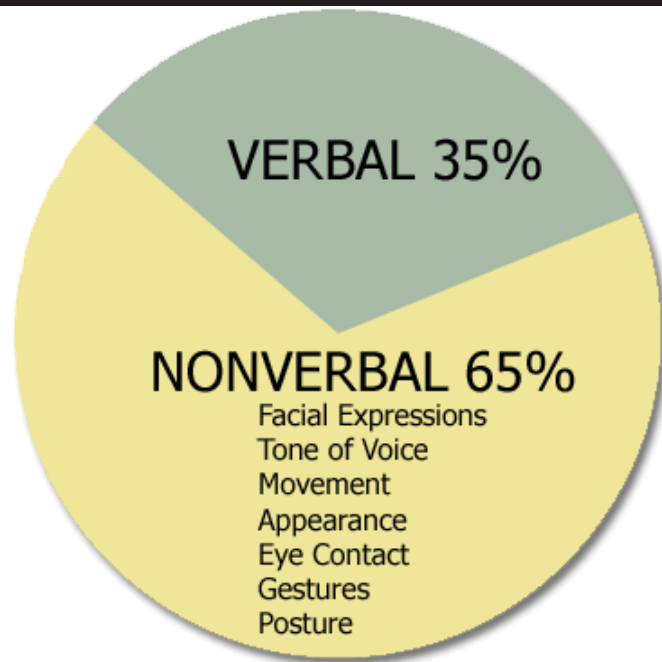
Following initial meeting, you will need to consider what support CAC said it will need:

- How will the union support CAC, given its resources?

And you will soon need to figure out, upon further contact:

- What are the clearest areas of collaboration for the two organizations?
-

# Tips for Effective Communication



- Turn cell phone or other devices off before you enter the meeting
- Make good eye contact
- Face the person directly
- Do not interrupt the person talking, even if you feel they are attacking you
- Listen.....focus on the words the person is saying
- Ask probing questions but do not pry
- Keep an open mind
- Be mindful of your own tone of voice
- Pay attention to facial expressions made by you or the other person
- Be aware that signals can be misread... explain as you gesture
- Dress appropriately
- Prepare ahead of the meeting!

## THE 5 W's: The First Meeting

WHO

- From your organization is the best person to reach out to the particular group or individual

WHAT

- Is the purpose of your meeting with the group or individual
- Are some things you are interested in learning about from the meeting

With WHOM

- Will we meet from the organization

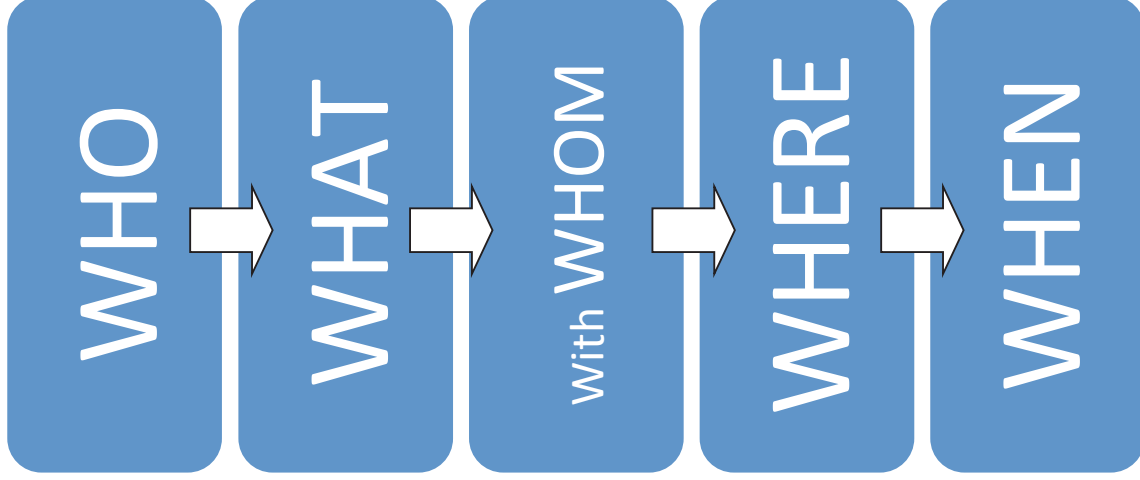
WHERE

- Is the best location for a meeting like this to take place

WHEN

- Is the best time of day or day of the month to reach out & meet with someone from the organization

## THE 5 W's: Future Meetings



- From our organization should be in regular communication from this group

- Are the ways we can support this organization given the resources we have
- Are the clearest areas of collaboration for our two organizations

- Should we be in communication with from their organization
- Are there multiple people we should be working with

- Is the best place for us to meet regularly

- Should the next meeting and future meetings take place

# Appendix 5

---

Community Schools

Community Schools





# Reclaiming the Promise

**Community schools. Community learning centers. Full-service schools. Community hubs.**

Whatever you call them, community schools make a difference in the lives of children, families, educators, and their communities each and every day.

Community schools can be an alternative or solution to school closures and privatization efforts. They aren't just centers of education—they are heart of the community itself that help create better conditions for both teaching and learning.

It is a concrete strategy that can help mitigate the impacts of poverty, deepen instruction, and engage students, families, and other key stakeholders around public education.

This isn't just another program: It's a paradigm shift in the way we think about schools that goes well beyond just providing supports and services for students.

## **Community Schools often:**

- Provide coordinated, innovative, and results-focused partnerships to help communities thrive by serving children and families.
- Provide services that meet the academic and non-academic needs of all children and their families through wraparound services, including language and social emotional supports in collaboration with community partners after school tutoring,
- Include robust and well-rounded curriculum such as the arts, sports, and other creative activities to prepare our children for college, career and active citizenship and give them the tools to learn and grow.
- Expand and restructure the school day to include community partners and provide more time for collaboration amongst teachers.
- Provide rich professional development for school staff and community partners.
- Provide connections for "families in crisis" to dependable resources from professional staff and other programs like financial planning, and tax preparation.
- Conduct authentic family and community engagement.

**Do Community Schools Make a difference in the lives of children and families?**

## School-level Benefits

### Academic benefits

- Community schools have significantly improved student outcomes on state tests
  - Results on state tests when compared to non-community schools
  - Results on state tests with increased growth since becoming community school)
- Significantly improved graduation rates
- Significantly improved AYP status at struggling schools measured by
  - Number of schools “turned around”
  - Study of AYP status after becoming community school

### Climate & Safety

- A long term outcome is a decrease in mobility
- Improved student and teacher attendance
- Significantly improved school safety measured by
  - Dramatic decrease in student disciplinary referrals, suspensions, or expulsions
  - Drop in number or percentage of schools persistently on dangerous list

## District-level Benefits

### Academic

- Improved AYP status of school districts (in addition to raising AYP status at individual schools)

### Financial

- Increases resources to schools/district by leveraging of existing resources through expanded partnerships – outside of school district and across agencies
- Can be done with little cost to District
- Sustainable strategy through blended funding (beyond the school district)
- Increases student population

## Systems Level Benefits

### Political

- Reduces friction between community and school leadership; creates community perception that District is working *with* community instead of against community.

- Creates more advocates for traditional district schools (due to increased partnerships, community involvement, and the change in public perception about the schools)
- Re-creates schools as buildings open to all constituents – not just those with students.
- Re-invests commitment to neighborhoods as communities

### Where else is this taking place? What are their results?

- Visit- <http://www.communityschools.org/results/results.aspx>

### In terms of Advocating for this Strategy, what do I do?

*Tell Your Story—focusing, when possible on specific stories from your schools and communities.*

- For example, “My student named Joe was at risk of being held back due to missing too many assignments and bad behavior. Because one of the needs determined by the community was a clinic we learned that he couldn’t see and was able to get him glasses. Joe is now on reading level and working with tutors and staff to make up work.”
- You, your union members, and community partners know best how to tell your story. First hand experiences from your teachers and school support staff are the most powerful advocacy tool you have.
  - The most impactful stories both share an anecdote about the power of community schools to change outcomes for children and families, and also include some information/data about the outcomes that you have seen in your community.
- Paint a picture of what is happening at a particular school; include information about outcomes, data, and measured progress towards goals. **DATA is important!**
- Reference the fact that implementing the community school strategy gives local schools and public agencies an infrastructure through which they can ensure that their schools and communities are doing what needs to be done in order for children to learn and achieve, and to enable teachers and principals to focus on facilitating learning and on helping children reach high standards while also relieving their burden of trying to address children’s needs on their own as is the case in traditional public schools.



# Appendix 6

---

Campaign 2016

Ten Rules for Talking to Members about Politics

Phonebank Prep Checklist

Troubleshooting Obstacles to Work-Site Political Programs

Work-Site Political Program Plan Template





*A Union of Professionals*

## Ten Rules for Talking to Members about Politics

1. Issues come first, candidates second. Members want political action to be based on issues. Working to elect pro-education candidates is a step towards being able to have an impact on an important issue – not an end in itself.
2. Members want information, not voting instructions. Before members will respect endorsements, they need to see what led to them – positions on issues, voting records and other facts that will help them make up their minds.
3. Present information credibly and objectively to overcome members' distrust of politics. Members trust us more than many other sources, but members are extremely skeptical about politics. We should cite information sources, for example, and avoid implausible claims about how good one candidate is and how bad another is.
4. Downplay partisan rhetoric and stress the unions' role as an independent voice for working people. Members don't want their unions drawn into the excessive partisanship that Americans generally consider the downfall of our country's political system.
5. Unions should be watchdogs that hold politicians accountable. Because our members are very cynical about politics, we should make clear we recognize the danger of betrayal by politicians. Then we should hold accountable those we support.
6. Members want unions to represent their interests to workers, focusing on work-related issues and advancing a populist economic agenda.
7. Union political action should always be “of, by and for” the members. We should provide members with opportunities to make their voices heard in our political process, through membership surveys, public candidate forums and toll-free numbers they can call to get materials or answers to their questions.
8. Information is also a key to increasing participation. Members strongly support get-out-the-vote efforts. Because members who are well-informed are much more likely to vote, educating them about the issues and candidates is a key way to boost turnout.
9. Members are best reached by modern communication methods. Labor newspapers and magazines reach only a portion of our members. We need to use a variety of communication tools, including direct mail, radio, television advertising, Web sites, and e-mail. Also try to take advantage of “free media”, such as that gained at rallies and other events where your union's presence conveys a message.
10. We're more effective when we address the concerns of specific union audiences, instead of relying on a “one-size-fits-all” approach. Target specific messages to specific union audiences – men or women, African-Americans, Latinos, younger or older workers, for example.

## Before the Phone Bank Prep Checklist – Handout

1. **Pick a location** – Identify the best union halls or other phone bank locations based on location, size, availability, etc. If using a predictive dialer, be sure to check the bandwidth of the Internet Service Provider for the phone bank location. Arrange for a leaseback agreement.
2. **Pick dates** – The biggest things you have to think about with picking dates is making sure it's not competing with a lot of different union activities. So if the largest local that participates highly in political work is having their monthly meeting that night, it's probably not the most strategic night to have a phone bank.
3. **Staff roles** – Here are some traditional phone bank staff roles:
  - Phone bank manager: A person who trains the coordinators, as well as staffs shifts with coordinators and cuts phone lists. (If your state is high density you may need more than one person in this role)
  - On-site shift coordinators: Create coordinator roles for each shift. You should have a coordinator for every ten people. This person welcomes volunteers, trains them and troubleshoots with them.
  - Volunteer recruiter: for phone banking volunteers. This person only thinks about getting you the number of people you need to meet your phone banking goals
  - An IT professional: Consider having a technical person who can assist you with minor glitches for the predictive dialer and troubleshoot technology.
4. **Develop work shifts** – Work with your zone leader or CLC field coordinators to determine the number of shifts needed as well as the number of volunteer slots per shift based on the amount of terminals at the phone bank location. Set shift times and schedules well in advance to allow rank and file members to plan activities within their staffing contract, or work around family and personal time. Knowing your shifts enables you to give a definite date and time to recruits.
5. **Script Development** – You went over script development in another session, but here are some general guidelines—keep it simple, know your ask, know who you're talking to, practice the script yourself and time it.
6. **Know state voting laws** – You need to know all of the essential voting laws for the state you're working in. Also, you will need to find out all pertinent information for how to vote: where, times, vote by mail postage amount, etc. You can find this list of questions in the handout "State Specific Voter FAQs"
7. **Prepare additional materials** – You will need other materials for volunteers to be their most effective and efficient. FAQs on the candidate, FAQs on issues we're advancing, scoring a voter, a troubleshooting page for difficult voters we encounter, a colored piece of paper the volunteer can hold up if they need help. Please refer to the handout "Materials for Volunteers Checklist" as well as the materials for volunteers: "Do's and Don'ts of Phone Banking", "Voter Scoring", "State Specific Voter FAQ" and "Tips for dealing with Difficult Calls."



# Before the Phone Bank Prep Checklist – Handout

8. **Prepare a welcoming speech** – Write a two minute speech that is inspiring, helps volunteers understand they are part of something bigger, and excites them. Include campaign goals, acknowledge the reason they volunteer, and thank them! When you prepare your welcoming speech, don't forget to use the economic framework from Commonsense Economics.
9. **Set metric goals** – These are general guidelines for you to use in order to set metric goals per shift for your phone bank. Remember, every state is different, and rates go up and down based on if the calls are persuasion or GOTV. Let's go over them in detail.

With a predictive dialer system, expect a caller to make 10 connections per hour, or 30 connections in a 3 hours shift. By connections we mean conversations with voters.

For users of handheld phones, the ability to move IDs and GOTV calls is lessened. For handheld dialers, if no message is being left, expect a person to be able to have 4-5 conversations per hour. If a message is being left, cut it down to 2-3 conversation per hour.

Along with these numbers, it's important to take into account the impact rates every time an entire targeted universe is completed with one pass through.

- Labor Persuasion Phone Pass 2%
- Labor GOTV Phone Pass 4%
- General Public Persuasion Phone Pass 1%
- General Public GOTV Phone Pass 2%

10. **Prepare your phone lists** – Here are a few pointers to keep in mind when cutting lists. Always remember your predictive dialer runs faster with more data. Additionally, if possible, phone bankers like to know that they have a geographic area they are phoning, and you can say at the end of the shift that we contacted X number of voters in X legislative district or zip code or neighborhood.
11. **Create a welcoming, organized and clean environment** – When we provide a quality work environment where we don't run out of things like pens and paper, water, and candy, and if we have clear signage directing volunteers to the phone bank or to restrooms, it shows we know what we're doing.
12. **Have a back-up plan.** As the manager, it's important to have a back-up plan in case the predictive dialer goes down. Have a hand held phone replacement for every terminal you have.
  - Have a fast printer ready to print out lists
  - Always remember that the metrics for the night will change and make note of that in reporting
  - Close-out operations need to include recharging all phones after use
  - Have a plan in advance for who is in charge of repairing (or getting someone to repair) the predictive dialer.
13. **Use the diagram** – As you're planning your phone banks and the location, use this diagram as a guide. It is included in your handouts. This diagram shows what an ideal phone bank set-up looks like. It allows for some noise reduction with the dividers between each terminal, the ability of the coordinator to view the terminals, as well as easy access to materials. At the bottom of the diagram are ideas for things to put on the walls to make people feel like they're a part of the campaign.

# Day of the Phone Bank Checklist – Handout

1. **Welcoming volunteers** is one of the more critical pieces that we often overlook. Welcome volunteers as they come in and be sure they sign in!
2. **Streamline** – If you have a large phone bank with over 20 volunteers, consider guiding them into smaller groups immediately. If your volunteers are not showing up on time, consider having one of the coordinators/trainers take the first 10 volunteers and begin immediately, while the other coordinator gets people in the door and signed in. Another volunteer or coordinator can gather the volunteers who arrive late and train them. This kind of structure allows volunteers who were on time to keep to the planned schedule and get moving. This means there will be two coordinators giving the welcoming speech and training.
3. **Introduce yourself** – Have everyone introduce themselves.
4. **Give them your welcoming speech** – Explain why this is so important, why their volunteering is important, what your campaign goals are.
5. **Training your volunteers** – Here are some steps we recommend you take as you train your volunteers:
  - Materials Review – Go over the materials in detail. Make sure your volunteers understand the materials and they're comfortable with them. Please use the material checklist handout.
  - Script Review: Make sure everyone is familiarized with the script.
  - Get each volunteer to a terminal and individually go through the first call with them.
  - Make sure their rap isn't rushed and is conversational.
  - Scoring: Scoring a voter is one of the most essential pieces of the campaign. When we don't have it right, volunteers won't have it right. Let's go over this slide in detail. You also have a handout on this called "Voter Scoring." A good idea is to tape this to the walls or corkboards behind the terminal so that they can see it at all times. Let's go over this scoring now:
    - #1 This voter is with us 100%.
    - #2 This voter is leaning towards us.
    - #3 This voter is neutral and needs more follow up for PERSUASION.
    - #4 This voter is mildly opposed.
    - #5 This voter is very opposed.
6. **Troubleshooting** – Always train volunteers on how to handle difficult calls. We have a handout called "Tips for Difficult Calls." Please go over this handout in detail during the volunteer training, but don't over-emphasize it and scare them. Be present and aware during every minute of the phone bank—look for volunteers struggling with difficult calls. We have outlined common challenges in the handout called "Troubleshooting with Volunteers." Please read this before you start your phone bank and get ready to coach your volunteers through these challenges.

# Day of the Phone Bank Checklist – Handout

7. **Keep it fun** – Sometimes we need to liven things up a bit for volunteers to keep them excited: candy, ringing bells every time a supporter is identified, and a thermometer to chart getting closer to the goal. Be creative!
  
8. **Close Out** – On the operational side, clean up the phone terminals and wipe down headsets. Make sure there are enough materials for the next day. Make sure you inform the phone bank coordinator of refreshments that need to be replenished. This checklist is covered in the handout “Day of Phone Bank Coordinator Checklist.”
  - a. Ask volunteers to sign up for their next phone bank shift and bring other volunteers. It’s important to thank volunteers and show unity in some way. Debrief with them, get input on what worked and what didn’t, and show them how many calls were made.
  
9. **Evaluate** – Ask a few questions. What was the most effective point they used to persuade a voter? Were there any issues flagged by voters e.g. getting calls or door knocks from the opposition? Were any parts of the script difficult to articulate that should be modified for the next phone bank? Finally, have a very short evaluation ready that the volunteer can fill out at the end of their shift. This document should not take more than two minutes to fill out and should objectively assess what was a challenge and what went well. There is no blame game here—it’s about meeting the goals. If you’re not meeting your daily goals it could be an issue of tweaking the script, or working more closely with volunteer recruitment to increase volunteer volume. It could be that you need to shorten the shift by a half hour because your volunteers are too fatigued during the last stretch. It could be that you need to tweak the shift times because you’re calling too early before people are home from work. Make adjustments to the plan when necessary.
  
10. As a manager, having a reporting and issue solving structure is crucial so you can assess metrics and work through staffing issues.
  - First, set up a nightly reporting structure. Will it be a nightly call or will it be nightly email reports?
  - The Field Director needs to be aware of any red flags that are raised. For example, are volunteers hearing from voters that the opposition has been calling either via robo calls or live calls? What is the opposition’s message?
  - Additionally, the Field Director needs to be aware of any issues with volunteer retention and the morale of release staff. These issues can be solved as long as the Field Director is aware and can work to resolve them with you and others.

## Voter Scoring – Handout

- #1** This voter is with us 100%
- #2** This voter is leaning towards us
- #3** This voter is neutral and needs more follow up for PERSUASION
- #4** This voter is mildly opposed
- #5** This voter is very opposed

## Tips for Dealing with Difficult Calls – Handout

**Purpose:** You may encounter voters over the phone who are unfriendly or openly hostile, or who express views that you disagree with or are offensive to you. This is a tip sheet for how to handle these conversations.

**Remember:** Keep in mind that the people you are calling may come from very different backgrounds from yours and may hold views that conflict with yours. These attitudes may be reflected in the language they use or by what they say.

**Always be nice:** Our goal is to persuade the voters we phone, not to confront or berate them, even if their views are offensive. At the same time, you do not have to tolerate any kind of abusive behavior.

As you are contacting voters, please keep the following guidelines in mind:

1. If a voter makes remarks or comments that you find abusive or threatening, just say, "Thank you for your time," and end the call.
2. Always be courteous and professional, even if the voter is rude or expresses offensive views.
3. Never react angrily; don't provoke or feed a confrontation.
4. If the voter makes racist or sexist comments about the endorsed candidate(s) or anyone else, use your best judgment on how to handle the situation. If you can, try to engage the person in a discussion aimed at alleviating concerns the voter has. If you feel uncomfortable doing that or, based on the circumstances, think that will make the voter angry or simply not be productive, just say, "Thank you for your time," and end the call.
5. When in doubt, say, "Thank you for your time," and end the call.

Always talk to the phone bank coordinator about difficult situations and how to handle them.

# Troubleshooting with Phone Bank Volunteers – Handout

As a phone bank manager, you will need to help volunteers deal with common problems. Here is a short list of some of the most common issues:

- **Voters feel overwhelmed with calls:** Voters are sometimes angry because they are receiving so many calls. This is common when the election is close and/or a voter appears to be persuadable or undecided. In this situation, a volunteer should remind the voter of the importance of the election and how s/he will play a crucial role in deciding the election outcome. Reiterate how important their vote is, say the election is expected to be close, and let the voter know we appreciate his or her time.
- **Calling senior voters:** Seniors and retired voters are a very active block of voters in our electorate. Often, they have the time to talk about politics and debate with your volunteers. We suggest that volunteers kindly and very gently move the conversation along, be conscious of time, score the voter, and complete the call.
- **When using a predictive dialer, voters are hanging up:** With predictive dialers, there is sometimes a silence or short time before the caller and the person receiving the call are able to hear one another. In this short silence or gap in the call, the voter will sometimes hang up. This is a common problem. We suggest the volunteer start saying "Hello" as soon as the call is connected, so the person on the other end hears the volunteer. Hopefully doing this will prevent the voter from hanging up.

# State Specific FAQs – Handout

Make sure you have an answer to all of these questions on a handout for phone bank volunteers:

1. How do I register to vote?
2. Where is my polling place?
3. When is my polling place open?
4. How do I request an absentee ballot?
5. What's the deadline to request an absentee ballot?
6. Can you pick up my absentee ballot and deliver it to me?
7. When can I vote early?
8. Where can I vote early?
9. What do I do if I am turned away at the polls?
10. If I don't have transportation, can I get a ride from you to the polls?

## Phone Banking Do's and Don'ts –Handout

- **Do** read campaign materials in advance, practice the script and follow the script!
- **Do** thank voters who say they will vote our way. We want them to feel good about themselves and our call.
- **Do** be conversational. Use a relaxed and friendly voice. Follow the script, but create a call environment where the people that you're calling feel comfortable asking questions.
- **Do** make sure that when people say they will vote our way, they mean it. Sometimes they are just trying to get you off the phone. We will be reminding these people to vote. We are counting on volunteers to accurately identify the voters we should turn out on Election Day.
- **Don't** lie or elaborate on an issue you aren't sure about. If the answer isn't on your issue sheets, be honest and tell the voter you don't know the answer, but you will get back to them. Write down their name and phone number, get the information for them, and call them back later.
- **Don't** get into arguments with people who are voting for others. We can't do anything about them except work harder to find the people who are on our side.
- **Don't** rush the script. **Make the script your own.**



## **Checklist for Phone Bank Volunteer Materials Packet – Handout**

- ✓ Script
- ✓ Phone Banking Do's and Don'ts
- ✓ Dealing With Difficult Callers
- ✓ FAQ on Candidate
- ✓ FAQ on Issues
- ✓ Scoring Sheet





## **Troubleshooting obstacles to Worksite Political programs - Handout**

<b>Management Opposition</b>	<b>Worksite Size &amp; Geography</b>
<p>You may hear union leaders or members say management does not allow worksite communication. In fact, unions have the legal right to distribute information and talk to union members during non-work time (lunch, break time, and before or after work) and in non-work areas (break rooms, bathrooms, cafeteria hallways, etc.). As long as your outreach does not interfere with the work of the members, unions can communicate with them.</p>	<p>Some areas of a worksite might be inaccessible or have staggered work schedules. The key to overcoming problems in worksite geography is to recruit a union member in each area and shift of a worksite to be in charge of communication with the membership there. These activists should be encouraged to recruit new activists to the union.</p>
<b>Lack of Activists</b>	<b>Fear of Member Reaction</b>
<p>A lack of activists should not stop a local union from engaging its members at the worksite. The action of mobilizing generates activism in union members once they see activities taking place. Think "Action Builds Activism." Engage your current activists (stewards, bargaining committee members, etc.) in worksite mobilization, and make sure they are asking for volunteers to help. New activists can be brought on by asking them for help with specific tasks.</p>	<p>AFL-CIO research has shown union members want to hear from their union about issues related to their work. Retirement, health care, trade, education, and workers' rights are just some of the issues that members respond positively towards, if presented in a credible manner. What union members don't like is when their union tells them how to vote, or sounds too partisan and rhetorical. Union members want to hear about issues and have their opinions heard, so take a "listen and inform" approach.</p>
<b>Perception of Partisanship</b>	<b>Doubt about Effectiveness</b>
<p>Our membership is politically diverse, with both Republican and Democratic members. To unite our movement, we must make it clear to our members that our values and issues matter most, not partisanship.</p>	<p>Often people will mask an unwillingness to engage in worksite organizing with doubt about its effectiveness. "It doesn't work" or "My members won't like that" are common refrains. This is not a "Program of the Month," but a way to build our movement and motivate workers. Challenge this doubt by asking for alternative tactics and reasons why those tactics are better.</p>
<b>Member Apathy</b>	<b>Hatch Act (Public Employees)</b>
<p>Overcome apathy by making the issue compelling and motivate members with the issues that they care about. They are more likely to participate in the outreach effort if they understand the issues and are confident in the plan to win. Recognize that union members care about a lot of meaningful issues, but the importance of certain issues is not instinctively clear, so it is up to us to show relevance to our members.</p>	<p>The "Hatch Act" is a federal law that limits "political activity" of public employees while they are working. However, it does allow for non-partisan issue education during break time or before/after work. As long as you do not interfere with work, or link the issue with the election of a particular candidate. Check with your union for state-specific laws that govern state employees.</p>

# Worksite Political Program Plan Template

---

*Using your case scenario, please fill out the following sections*

**1. What type of organizing drive is this?**

Electoral Campaign? Other? \_\_\_\_\_

**2. What are the goals and deadlines of the campaign?**

---

---

---

**3. What type of workers are you organizing?** How would you describe these workers? Describe what you think are important issues for them at work and their personal lives?

---

---

---

---

**4. Who are the key contacts in your worksite? What makes them key?**

---

---

---

---

**5. Who are other important potential activists (besides your key contacts) you can recruit in the worksite to achieve your goals?**

Why is it important to recruit them?

---

---

---

**6. What are the best times and locations for reaching your membership?**

---

---

---

**7. What is your plan to extract data from the worksite? How would you use that data? Where will you put that data?**

---

---

---

**8. What are the materials or information you need to bring to your Worksite Political Program drive?**

---

---

---

**9. Describe your worksite communication structure AND strategy. Please devise a plan that goes beyond contacting or using stewards. (Please say how many times you will reach your members and how, also your strategy to reach deep into the membership going beyond steward structure)**

---



---



---

**10. Campaign Chronology:** In this table, please outline a timeline of events, deadlines, goals/milestones you require to move your campaign from one step to the next? (In developing milestones and deadlines, please be specific. (IE. Recruit X number of building reps at X location by X date) **Note:** Make your calculations assuming the rule of halves.

Campaign Goal	Steps needed to meet each goal (in chronological order)	Strategy (describe here individual activities you need to do in order to execute the steps	Date/Deadline	# of worksite conversations or contacts with members are needed for each activity?



Leadership Education and Development

<b>Campaign Goal</b>	<b>Campaign steps needed to meet each goal (in chronological order)</b>	<b>Strategy (describe here individual activities you need to do in order to execute the steps)</b>	<b>Date/Deadline</b>	<b>How many organizations or members are needed for the activity?</b>







*A Union of Professionals*

American Federation of Teachers, AFL-CIO  
555 New Jersey Ave. N.W.  
Washington, DC 20001  
202-879-4400



[aft.org](http://aft.org)



AFTunion



@AFTunion

