

Blitz Planning and Organizing Toolkit

Context/Overview

This toolkit is a resource to use when conducting a field organizing experience. A field organizing experience brings staff, leaders, and members together for relational, issue-based organizing. .

We recommend the following goals for field organizing experiences:

1. Identify issues and concerns at the work site level
2. Membership recruitment, retention, and engagement
3. Leadership team building at worksite level through identification of "natural" leaders
4. Identification of activists or mobilization of members
5. Identification and development of members organizing and leadership skills and abilities

Example Timeline

Months Prior to the Field Organizing Experience

Make a plan - Begin making your organizing plan and set both qualitative and quantitative goals for this effort. Field Organizing Experiences are most effective when executed in the context of a current organizing campaign. A detailed plan includes: compelling issue(s), goals, timeline, budget, training, benchmarks, and an implementation team.

6 – 8 weeks prior to the experience

Secure data/lists - At this point you'll also want to start thinking about ways to secure data and lists about your members or potential members. Some locals are able to work with the district to request full staffing lists, others have to work to pull staff lists from individual school websites. In general the more information there is on a given list the better. Information such as phone number, email, zip code, and address are ideal. However, information such as first name, last name, middle initial/name, and worksite can also be helpful. The higher the quality of the data the more useful it'll be during the experience. If you have questions about data, contact your state affiliate.

4 weeks prior to the experience

Build your team – A successful field experience requires a team of people working together with clear roles and responsibilities. Work with your team to figure out things like: who will schedule the visits, who will prepare the materials, who will communicate with leaders/activists, etc.

Prepare members for being released from duties in order to participate. This can include union release time, requesting substitutes, etc. depending on your contractual rights.

2 weeks prior to the experience

Prepare the experience's schedule – The schedule should outline general dates, times, and locations important to the blitz. It is always necessary to hold an orientation for participants at the beginning of the

field experience. Other important activities to schedule include daily briefings, any training components, and times to report back to your central location for the daily debrief. You should also create space for celebrating and sharing of learnings throughout the time together for the field experience.

1 week prior to the experience

Create your field teams and make assignments - Create field teams of based on size of list, size of worksite, diversity, strengths of team members, and other local considerations. Print out your lists and assign work sites, phone calls, or home visits for each team. As you assign lists, prioritize lists that are most in need of a organizing work.

Put together packets for field teams- Double check that your packets have everything that you need to meet your objectives. Do you have membership forms? An engagement piece such as a petition? Lists? A local flyer about your priorities and successes for the year? Talking points for the field teams about key issues?

The following Pages Provide Example Materials and Resources

Example: 1 on 1 Conversation Notes Sheet

Person's Name: _____

Work Site: _____

Position/Grade Level: _____

Person's Home Email: _____

1. Get to know them: Abilities, Skills or Talents:

2. Finding their issue(s): If you could change one thing about the district/your classroom what would it be? How does that affect you? Your family? Your students? How does that make you feel? Have you tried changing it?

3. Finding solutions to issues and challenges. What is the member willing to do?

4. Leader ID: Who are some other trusted and respected colleagues that would be good to talk to? Why?

5. Other information we should know:

Conversation assessment:

1 – Supportive Member Leader w/ Followers

2 – Supportive Member

3 – Persuadable Non-Member

4 – Unsupportive Non-Member

Your Name: _____

Date: _____

MEMBER CONVERSATION TRACKING SHEET

(FILL OUT IMMEDIATELY AFTER CONVERSATION)

Member/Potential Member Name: _____ Position/Subject: _____

Work site: _____ Years at this school: _____ Years In district: _____

Top 3 issues:

- 1.
- 2.
- 3.

Who would you say are some of the most trusted and respected staff at your work site? Who do you go to for guidance? Why?

(Aim for 2-4):

- 1.
- 2.
- 3.
- 4.

Any additional notes (optional):

Follow-up Needed:

Organizer Name: _____ Date: _____

Site Visit Report Form

Work Site: _____

Date: _____

Visit Time: _____

Building Rep(s): _____

Ease of access and receptivity at this site: (choose one):

☐ Very welcoming ☐ somewhat welcoming ☐ Difficult

	# of Certified	# of Classified	Total
Quality Contacts - Members			
Quality Contacts – Potential Members			
Membership Forms Completed			
Commitment Cards (Or additional action)			

Potential Leaders Identified:

Name	Assessment	Notes

Potential Members for Follow-up:

Name	Job (grade, department or classification)	Notes

Submitted by: _____

Please put additional notes from visit on back of work sheet.

Home Visit Daily Report Form

Field Experience Team: _____ Turf: _____

Please tally these numbers:

Homes Visited:	Contacts:	Assessments: 1's- 2's- 3's- 4's-
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What quality contacts did you make?

Name	Local, School, Position	Assessment	Notes (included action taken)

What else should we know from your visits?

Sample Member Commitment Card

THIS SCHOOL YEAR, I PLEDGE TO SUPPORT
GREAT PUBLIC SCHOOLS BY:

- | | |
|--|--|
| ☐ Serving as an Association Representative at my worksite | ☐ Engaging in a community service event |
| ☐ Attending a school board meeting | ☐ Registering to become an Education Cyber-Lobbyist on state and national legislation |
| ☐ Helping coordinate a professional development activity | ☐ Joining an Association Committee |
| ☐ Participating in outreach efforts by contacting members | ☐ Assisting with planning events |
| ☐ Belonging to my professional Association | ☐ Other: _____

_____ |

NAME:

SCHOOL/WORKSITE:

HOME ADDRESS:

CITY/STATE/ZIP:

HOME PHONE:

CELL PHONE:

PERSONAL EMAIL:

Sample Field Experience Schedule

Sunday, 7/26	Monday, 7/27	Tuesday, 7/28	Wednesday, 7/29	Thursday, 7/30	Friday, 7/31
1PM – Participants arrive. Training begins: Campaign briefing, review week's schedule review, and conversation role-plays, etc.) 6PM – Training concludes. Teams given assignments for tomorrow 7PM – Group dinner	8AM – Elementary School Site Visits 1PM – Middle/High School Site Visits 3PM – Daily Debrief 5PM – Phone Calls or House Visits 8PM – Phone Calls or House Visits Conclude (All meals self scheduled)	8AM – Elementary School Site Visits 1PM – Middle/High School Site Visits 3PM – Daily Debrief 5PM – Phone Calls or House Visits 8PM – Phone Calls or House Visits Conclude (All meals self scheduled)	8AM – Elementary School Site Visits 1PM – Middle/High School Site Visits 3PM – Daily Debrief 5PM – Phone Calls or House Visits 8PM – Phone Calls or House Visits Conclude (All meals self scheduled) (Depart Thursday night if possible)	8AM – Elementary School Site Visits 1PM – Middle/High School Site Visits 3PM – Daily Debrief 5PM – Phone Calls or House Visits 8PM – Phone Calls or House Visits Conclude (All meals self scheduled)	8AM – Elementary School Site Visits 1PM – Final Debrief 2PM – Group Photo (Depart Friday afternoon)

Checklist and Questions for a Successful Field Experience

Checklist:

- ___ The Local Association is on board
- ___ The State Association is on board, if applicable
- ___ The dates are confirmed with all stakeholders
- ___ There is a team of individuals from the local responsible for the overall success of the field experience
- ___ The experience will help launch or build on an organizing campaign
- ___ The local's organizing campaign has a compelling issue and message
- ___ Local staff, leadership, and membership will participate in the experience
- ___ There is a training plan for teams on organizing conversations, key local issues and collecting data
- ___ The experience will further identify and develop the local association's worksite leadership
- ___ We've secured the lists and data needed for members and potential members
- ___ That data has been uploaded into the VAN or other data tracking tool when and where needed
- ___ We've secured access to worksites at appropriate dates and times, if applicable
- ___ We have discussed and secured agreement to include home visits or phone calls, if applicable
- ___ We have a means to keep track of key metrics (conversations, issues, members engaged, members recruited, leaders identified, etc) per visit so they can be reported daily and entered back into the VAN or other data tracking tool

- ___ We have created a “to do” list for the experience: for example, gather school or worksite rosters and schedules, building maps, schedules for staff and room assignments; arrange for substitutes, pair teams, and print worksite rosters including list of association reps at each worksite and template for reporting conversations
- ___ We have determined transportation to worksites and reimbursement for use of personal vehicles
- ___ We’ve developed a follow up plan at the local level that ensures that the effort of this experience will translate into long-term power building for the local affiliate

Questions to consider:

Participants

Who will be participating in this experience from the local and state affiliate, if applicable?

Will local leadership participate in teams going out into the field or making phone calls?

Does the local have current activists and/or work site leaders that will be part of the experience?

How many members, UniServ staff and leaders will be needed?

Who is prepping the materials (i.e. conversation note sheets, worksite visit debrief sheets, snacks, flyers, etc.)? Who is training teams?

What specific skills will participants gain or further develop in this field experience?

Data

What is the data capacity of the local? Do they regularly use the VAN or other data tracking tools?

Who will prepare the lists/data for phone calls, home visits or worksite? Who will enter the daily data from the experience into the VAN or other data tracking programs?

What training/support on data collection and reporting does the local need prior to the experience?

Follow Up

What critical information and data will be collected in order to execute a follow-up campaign (i.e. tracking potential leaders, engaging new members, key issues, etc.)?

How will the local assess the data? How will the follow up plan be implemented? Who will be responsible

Daily Debrief of Site or Home Visits or Phone Calls

Example: Debrief Questions

1. What went well? What didn't? Why?
2. What constraints or barriers did you face?
How did you overcome them or did you?
3. What did you learn?
4. What surprised you?
5. What issues did you identify?
6. What was the atmosphere of the work site?
7. How can we do better in the future?