

High Participation Locals

Introduction: The Anatomy of a High-Participation Local

Transitioning a local union from a **"servicing model"** to a member-led **"organizing model"** is not a matter of luck or abstract theory. It is a rigorous, highly technical craft that requires a complete restructuring of governance, staff roles, data systems, and campaign execution. Over years of close coaching, strategic grantmaking, and extensive field evaluations, the NEA Campaign Lab (and its predecessor Strategic Campaign Institute for Community Schools) has mapped the DNA of affiliates that have successfully achieved this shift (although every local would say they are always becoming, never arrived).

To help emerging locals apply these lessons on the ground, the Campaign Lab has synthesized this structural knowledge into an advanced online curriculum, **"Building and Coaching High Participation Locals,"**. This section outlines the core takeaways of that research, organized into eleven distinct thematic parts:

- **Part I: School Site Leaders & Contract Action Teams** — An analysis of how high-participation locals transform campus representatives from passive information-distributors into active, empowered organizers who manage 10-to-1 organizing ratio, resolve Level 1 grievances locally, and run building-level governing councils.
- **Part II: The Union Staff Role** — A detailed look at how field staff transition from direct grievance-handlers and transactional problem-solvers to strategic coaches, capacity builders, and organizers of synchronized campaigns.
- **Part III: Valley Work (Non-Bargaining Lulls)** — A breakdown of how high-participation unions treat the off-contract "valleys" as critical windows to build site-level power, enforce contract terms, run continuous skill-building workshops, and establish durable community alliances before a crisis strikes.
- **Part IV: Bargaining in High-Participation Locals** — A blueprint for democratizing the collective bargaining process, treating negotiations as active organizing campaigns, deploying massive, representative, and silent bargaining teams, and establishing radical transparency.
- **Part V: Being a President of a High-Participation Local** — A study of how local presidents shift their focus from administrative crisis management and "high-touch" operations to strategic coordination, geographic turf-walking, and budget reallocation that prioritizes grassroots power.
- **Part VI: How High Participation Locals Use Data to Build Power** — A technical overview of how successful locals decentralize data collection, replace passive record-keeping with active campaign tracking, utilize mobile-friendly database systems, and establish quantitative "gates" to measure actual member leverage.
- **Part VII: How High-Participation Locals Train Their Members** — A step-by-step breakdown of active organizing pedagogy, detailing the "gradual release" training model, the core "Skills to Win" curriculum, joint staff-member Train-the-Trainer (TTT) frameworks, and mobile, on-site learning strategies.
- **Part VIII: Overcoming "Respectability Politics" and the Fear of Conflict (The Psychology of Escalation)**: Centering on the psychological transition educators must

undergo to challenge authority, explaining why traditional labor-management collaboration/respectability politics is a structural trap, and highlighting how to build collective confidence.

- **Part IX: Defensive Organizing & Anti-Authoritarian Protection (Rapid Response and Community Defense):** Detailing how high-participation locals repurpose their strike machinery and site-level communications for rapid-response community defense—such as defending LGBTQ+ youth, protecting immigrant families from ICE, and preparing for election interference.
- **Part X: The Strategic Plan—Guarding the Roadmap and Building Coherence** – The transition from a passive "service model" to a high-participation organizing model requires local unions to move away from reactive, crisis-driven decision-making and embrace rigorous, long-term strategic planning.
- **Part XI: Methodical Structure Tests — Measuring Member Readiness to Build Supermajority Power:** A structure test is an escalating, quantifiable workplace action designed to measure the actual strength, coverage, and readiness of a union's internal organizing structure (such as Contract Action Teams, Site Organizing Squads, or building stewards) before escalating a campaign.

Part I: School Site Leaders & Contract Action Teams in High Participation Locals

In high-participation local unions, school-site member leaders—often referred to as chapter chairs, faculty representatives, Union Building Committee (UBC) members, or Member Engagement Team representatives—act as the direct, empowered face of the union on their campuses. Instead of acting as passive "reps in name only" who simply pass down top-down memos from union headquarters, they take on highly active, strategic organizing roles. Specifically, school-level member leaders carry out several vital responsibilities:

1. Resolving Initial Grievances and Enforcing Contracts Locally

- **Direct Conflict Resolution:** Instead of relying on union staff or the local president to handle basic building disputes, site leaders are trained to resolve Level 1 grievances directly with their principals. School-level leaders systematically reject the passive expectation that union headquarters will solve every problem. As one local leader routinely reminds their members:

"We're not the personal staff rep to solve every problem with your principal, you're going to have to manage your working relationship... And exercising the contract is everybody's responsibility."

- **Operating with Building Swagger:** Building representatives are empowered to see themselves as the ultimate authority of the union on their physical campus. Columbus EA leadership emphasizes this leadership identity:

"They are the president of the union in their building... they should be operating with... just as much swagger as any CEA officer. You're the union in your building, you represent your building."

- **Fostering Direct Member Ownership:** When workplace issues arise, site leaders push their colleagues to act collectively rather than waiting for a third party to save them. As Beverly Teachers Association in Massachusetts leadership explains:

"The union isn't going to solve this problem. We are the union, what are we going to do about it together? That's where the power is."

2. Building and Managing the "10-to-1" Organizing Ratio

- **Mapping the Campus:** Site leaders physically map out their campuses, grade levels, or departments to ensure that every coworker has a designated, face-to-face union contact.
- **Building Chapter and/or Contract Action Teams (CATs):** They recruit and oversee CATs to establish a strict 1-to-10 or 1-to-20 organizing and communication tree across the building.
- **Amend By-Laws to Expand Participation:** The Oakland Education Association provides a powerful structural blueprint for how a local can systematically dismantle member apathy and build supermajority participation. Historically operating as a "sleepy union" where building representative roles were seen as an unwanted burden decided by "whoever lost the coin toss," OEA amended its bylaws to dramatically expand representation, growing its site-level footprint from 80-plus representatives to nearly 200 elected building reps.
- **Site Organizing Squads:** To make the communication ratio sustainable and prevent leader burnout, some high-participation locals utilize "Site Organizing Squads" made up of non-elected, volunteer members. Oakland Education Association uses Squads. Very similar to a CAT, these squads support the elected building representatives in physically mapping out campus wings, grade levels, and departments, ensuring every coworker has a direct, personal union contact.
- **Site Organizing Leads & Community School Leads:** In addition to traditional contract-enforcement site reps, the Anaheim Secondary Teachers Association (ASTA) established a Site Organizing Lead on every campus to manage 1:10 communication trees. ASTA also bargained to create Community School Teacher Leads at every site—district teaching positions selected jointly by parents, union reps, and administrators that ASTA integrates into its organizing structure to help educators co-create community-relevant curriculum.
- **Deploying Multi-Use Structures:** Site teams are utilized not just for high-profile contract campaigns, but as permanent, local fighting tools. UTLA leadership outlines how this structure functions on the ground:

"Your chapter action team, you're going to use it for everything, basically... If you have a bad principal who's doing some bad stuff that, frankly, the UTLA officers are never even going to know about because there's 900 schools, use your chapter action team to organize the actions to jam up the principal's office, or to...raise a particular issue during a faculty meeting, or whatever."

- **Sharing the Load to Prevent Burnout:** To keep organizing sustainable, leaders divide responsibilities across a team rather than attempting to hold up the school building alone. Fall River Educators Association (FREA) leadership notes:

"Don't try to do it all yourself... we're building something that's not based on an individual, it's a team, and it can keep going."

3. Performing Active List Work and Member Assessments

- **Working the Lists:** Leaders maintain accurate, up-to-date member data. Using digital tools like Action Builder or physical wall charts, they track who has engaged in union actions, signed petitions, or attended meetings.
- **Conducting Organizing Assessments:** During high-stakes dues campaigns or strike authorization drives, site leaders systematically assess every coworker on a 1-to-5 organizing scale.
- **Shifting to Self-Directed Systems:** This methodical list work transitions the union away from "high-touch" staff dependence.

4. Running Building-Level Governing Councils

- **Monthly Meetings:** Leaders convene monthly building councils—such as Association Building Council (ABC) or Union Building Committee (UBC) meetings—to address both contract enforcement and day-to-day operational issues that happen at school sites.
- **Leveraging Central Checklists:** Representatives follow structured beginning-of-the-year checklists to verify building discipline plans, enroll members in catastrophic leave banks, and log principal meeting minutes back to union headquarters.
- **Identifying Leaders & Training Leaders:** Running these local governance structures serves as the primary test for building a powerful, democratic rank-and-file foundation. As UESF leadership reflects:

"Being able to capacitate school site leaders, like rank-and-file members, into their own leadership exercises was the hands down biggest win for our local..."

5. Democratizing Bargaining and Mobilizing Site Actions

- **Silent Representatives and Observers:** Site leaders serve directly on expanded bargaining teams or attend contract negotiations as trained observers. They sit in the negotiations room, participate in caucus discussions, and report the unvarnished reality of the table back to their building colleagues.
- **Demystifying the Contract:** Having site leaders directly involved in bargaining transforms how contracts are understood and ratified. Fall River Educators Association (FREA) leadership highlights the immense difference this makes:
- *"If you do it this way, the members are going to be more aware... and you're not going to get slaughtered at the ratification meeting, because they have gone through the process with you."*
- **Using Social Spaces to Battle Apathy:** Finally, site leaders foster a vibrant, welcoming culture. Beverly Teachers Association emphasizes that the union cannot feel entirely negative or clinical:

"People forget... the power of having fun socially... a healthy social life for a union is... good... You have to make it fun too."

6. Transitioning from Dissemination to Member-Led Governance

- **Activating Representative Assemblies:** High-participation locals understand that representative assemblies and building council meetings must be treated as engines for member-led action rather than passive, top-down informational channels. In traditional servicing models, representative meetings are used almost exclusively to distribute union updates, contract advice, and administrative memos.
- **Encouraging Floor Initiatives:** High-participation locals fundamentally restructure these spaces by actively encouraging rank-and-file representatives to submit motions, initiate investigations, and propose committees directly from the floor. While giving members direct ownership over the union's agenda can feel uncomfortable and requires leadership to adapt to a highly distributed power model, it fundamentally dismantles the "self-third-partying" mindset where members view the union as a separate service provider.
- **Fostering Local Ownership:** When representatives realize they possess the formal power to drive the local's work, their engagement shifts from passive compliance to active, creative campaign-building on the ground, creating robust pipelines for leadership development.

7: Sustaining the Song: Burnout Prevention and the "Choir" Model of Leadership

Servicing unions are inherently fragile because they rely on a tiny, centralized core of overworked officers or staff who carry the entire representational and organizing load—a design that inevitably results in mass leader burnout. High-participation locals build durable, distributed leadership structures that normalize self-care and establish collective pacing, ensuring the union's power is never built around a single, fragile individual.

- **The Choir Analogy for Movement Sustainability:** True union power is realized when leadership is treated as a collective practice rather than a solo performance. **Columbus Education Justice Coalition (CEJC)** Organizer Izetta Thomas beautifully conceptualizes this long-term pacing through a choir analogy:

"In choir, in your different sections... people gotta breathe, right? And sometimes you're holding these crazy notes for a really, really long time, but the audience never knows that people are breathing... while you're taking your breath, I'm still holding the note, and when I hear you come back in, I can take a breath."

"If we are truly fighting for justice and liberation, then this is what that looks like, and when you need to take a break, you can take a break, because you know that everybody else is still carrying the torch... Otherwise, your knee's gonna buckle, you're gonna turn red in the face, the whole alto section gonna pass out, and the song is over. Well, this song never ends."

- **Distributing the Worksite Load:** To prevent building representatives from burning out, high-participation locals strictly enforce a distributed load model. Locals like the Fall River Educators Association (FREA) actively coach reps to share the work:

"Don't try to do it all yourself... we're building something that's not based on an individual, it's a team, and it can keep going."

At the building level, rather than forcing one rep to handle list work, new-hire recruitment, safety audits, and contract grievances, these responsibilities are divided among senior reps, alternates, and **Site Organizing Squads**.

At the executive level, locals expand their full-time release teams to prevent a single "officer bottleneck". Officers step back from Level 1 grievances to serve as strategic coaches, allowing them the capacity to focus on long-term campaign planning rather than daily operational crises.

8. Case Study: Minneapolis Federation of Educators (MFE Local 59) — Building and Scaling Contract Action Team (CAT) Structures

The Minneapolis Federation of Educators (MFE Local 59) provides a clear structural blueprint for how an urban local can transition from a "servicing model" to a high-participation organizing union by building dedicated Contract Action Team (CAT) networks. Prior to 2021, MFE Local 59 had no CAT structure and relied primarily on building stewards and staff to handle site issues and information flow. By establishing a multi-tiered CAT model—combining site-level teams with regional Area CATs—the local built the organizational capacity needed to run systematic structure tests and secure supermajority strike authorizations.

1. Origin & Launch: The 2021 Outreach Campaign

- **The Baseline Gap:** Historically, MFE's site-level representation was limited to building stewards, who primarily passed along information or referred individual grievances to staff business agents. There was no broad, multi-layered communication or organizing tree in place.
- **The Phone Outreach Campaign:** In the summer of 2021, MFE utilized grant funding from a Year-Round Organizing (YRO) program to run a comprehensive phone-tree outreach campaign across the entire membership. Organizers called through member rosters, asking educators to identify peers in their buildings who would be effective leaders for a new organizing role.
- **Establishing the CAT:** This summer outreach directly generated the recruitment pool for MFE's first formal Contract Action Team (CAT) structure, providing the immediate infrastructure needed to execute site-level structure tests and build strike readiness.

2. Tiered Architecture: Site CATs and Area CATs

To manage the local's 70 school sites effectively without over-relying on staff, MFE constructed a two-tiered CAT hierarchy:

- **Site-Level CATs (1:10 Ratio Goal):** At the campus level, CATs are led by a **CAT Lead** and supported by **CAT Members**. The goal of the site CAT is to maintain a **1-to-10 leader-to-member ratio** across grade levels, departments, and campus annexes so information can move rapidly in both directions.
- **Area CATs (Regional Strategic Layer):** MFE established **Area CATs** as an intermediate leadership body made up of appointed or selected member-organizers. Each Area CAT member oversees a regional turf of approximately 3 to 6 school sites.
- **Responsibilities of Area CATs:** Area CAT leaders facilitate regional CAT meetings, coach site-level CAT leads through organizing challenges, track structure-test participation metrics, and ensure site data is reported back to central leadership. Staff organizers and Area CAT co-chairs collaboratively plan the overarching CAT campaign work.
- **Transition to Strike Captains:** During active strike escalations, the CAT network converts into strike infrastructure: site CAT leads become site strike captains, while Area CAT leaders become regional strike captains.

3. Strategic Pacing: Disbanding vs. Reactivation

Unlike building steward roles or permanent committees that risk causing activist exhaustion, MFE manages its CAT infrastructure through deliberate cyclical activation:

- **Intentional Disbanding in "Valleys":** MFE intentionally disbands or pauses its site-level CAT network during non-bargaining "valleys" (the off-contract lulls between two-year bargaining cycles).
- **Concrete, Time-Bound Expectations:** MFE frames the CAT role around running specific, time-bound tasks rather than as an amorphous, permanent commitment. This lowering of long-term barriers makes recruitment significantly easier for local leaders.
- **Reactivation Cadence:** Approximately 9 months to one year prior to contract expiration, the local reactivates the CAT network around a clear, sequential schedule of 3 to 4 concrete workplace structure tests.

4. Methodical Structure Tests & High-Participation Outcomes

MFE utilizes site CATs to execute a disciplined series of escalating structure tests to measure actual member leverage, build collective confidence, and deliver raw data to the negotiating table:

1. **Bargaining Needs Survey:** Site CAT leads distribute the survey and track which members complete it, aiming for high building-level completion rates.
2. **Hand Petition / Platform Pledge:** A physical, site-level pledge or petition supporting core contract demands.

3. **Button / Photo Action Day:** Members wear union buttons or hold agitational signs pointing out district inequities (e.g., administrative pay vs. ESP wages) and submit photo evidence back to the union.
4. **Strike Vote Pledge:** CAT leaders conduct face-to-face 1:10 conversations to secure signed commitments from coworkers promising to vote "Yes" on a strike authorization.
5. **Formal Strike Authorization Vote:** The final quantitative test of member readiness.
6. **Quantitative Results:** Through this CAT-driven structure test cadence, MFE has achieved **over 90% member participation and over 90% "Yes" votes** across every strike authorization vote taken since 2022 across both its teacher and classified (ESP) chapters.

5. Data Systems & Worksite Tracking Infrastructure

- **Local Site Roster Tracking:** Worksite CAT teams historically maintained local Google Sheets (such as site-level rosters) to log individual member participation in actions like photo days and strike vote pledges.
- **Central "CAT Master":** Site-level data was subsequently transferred into a central "CAT Master" spreadsheet managed by union organizers to track engagement percentages across all 70 worksites.
- **Migration to Action Builder:** MFE is transitioning its site mapping and structure-test data tracking onto Action Builder to streamline real-time data collection for frontline CAT leaders.

6. Distinction Between Stewards and CAT Members

MFE maintains a clear operational distinction between building stewards and CAT leads to ensure workplace responsibilities remain manageable:

Feature / Role	Building Stewards	Contract Action Team (CAT)
Primary Focus	Ongoing contract enforcement, Step 1 grievances, and monthly admin check-ins.	Contract campaign mobilization and executing structure tests.
Meeting Cadence	Leads monthly Site Union Meetings and attends monthly steward assemblies.	Meets during active contract campaign windows (~9 months prior to contract expiration).
Operational State	Permanent, year-round worksite presence.	Activated for contract campaigns; intentionally paused/disbanded during "valleys".

9. Case Study: San Antonio Alliance Training Infrastructure & Worksite Transformation

Operating in a state without collective bargaining rights and navigating severe school district contraction—including 19 campus closures and three charter turnarounds across 86 school sites—the San Antonio Alliance (San Antonio, TX) transformed its local union model. The local shifted from an announcement-driven servicing model into a majoritarian organizing engine focused on building worksite capacity, democratizing governance, and executing community-aligned campaigns.

1. Worksite Restructuring: From Communicators to Campus Organizers

- The Traditional Model: Building leaders—historically known as Alliance Representatives (ARs)—volunteered to serve as mostly a one-way conduit of information between union headquarters and school campuses. Their primary tasks were limited to distributing physical newsletters, making announcements, and holding 15-minute top-down meetings without formal training on how to engage site administrators or organize around campus-specific grievances.
- The Modern Organizing Model: Today, the Alliance Rep is trained as the primary union organizer on campus. ARs use Structured Organizing Conversations (SOCs) to identify organic department and grade-level leaders to build Campus Action Teams (CATs). ARs are explicitly coached to distinguish between individual servicing complaints (referred to the union office) and collective campus issues affecting a whole department or school. When a collective issue arises, ARs pull workers together to lead direct, collective site-level action.

2. Training Pipeline & The Two-Year Member Organizer Program

To build a sustainable leadership pipeline across 86 campuses with a small staff of two field organizers, the Alliance constructed a multi-tiered training cycle modeled after the *Skills to Win* and *Organizing for Power* (O4P) frameworks:

- Back-to-School Worksite Leader Academies: Full-day workshops for building reps covering leadership identification, Structured Organizing Conversations (SOCs), inoculation techniques, and campus charting.
- General Assembly Mini-Trainings: 10-to-15-minute tactical skill-building modules embedded directly into regular membership meetings.
- One-on-One Roster Charting: Field organizers walk site leaders step-by-step through their campus rosters, mapping unengaged wings and department networks.
- The Member Organizer Program: The Alliance runs a two-year cohort program for Member Organizers (currently in the second year of its third cohort). All Executive Council members and Member Organizers complete either the full *Skills to Win* curriculum or the four-part *Organizing for Power* series, creating a skilled rank-and-file layer capable of coaching building leads across the district.

3. Structural Separation of Servicing and Field Organizing

To prevent field staff from being consumed by individual representation at the expense of long-term site organizing, the Alliance structurally separated staff responsibilities:

- **Dedicated Servicing Organizer:** A 30-year veteran educator (Gracie) handles all individual representational cases, Child Protective Services (CPS) interviews, and Level 1 and 2 grievances.
- **Dedicated Field Organizers:** Field organizers focus exclusively on site-level campaign building, leader identification, and majoritarian campus fights.
- **Servicing as an Organizing Gateway:** Individual representation is leveraged to build organizing capacity. When the servicing organizer receives multiple calls from the same campus, she hands the site off to field organizers, recognizing that multiple individual complaints indicate a systemic campus-wide issue.

4. Democratized Governance & Strategic Campaign Cycles

- **Shift to General Assemblies:** The Executive Council replaced traditional Representative Assemblies with General Assemblies (holding 5 per year) as the default governance model. While elected reps vote on the budget as required by bylaws, all major policy decisions—such as choosing campaign priorities, approving strategic plans, or taking stances on district propositions—are brought to General Assemblies where all attending members vote.
- **Decoupling Compensation from Issue Surveys:** Operating without collective bargaining, the local sets its own campaign cycles. On member surveys, the union intentionally removed compensation—treating wage increases as an automatic priority—to force members to identify other workplace and common good conditions, resulting in campaigns focused on educator workload and student behavior support.
- **Two-Year GHOST Strategic Planning:** Strategic planning involves 15 to 18 participants, including field organizers, the parent/community organizer (Sam), and the Executive Council. Operating on a two-year cycle using a GHOST (Goals, Objectives, Strategies, Tactics) model, the team focuses strictly on two overarching goals: (1) Building Membership Density, and (2) Building Capacity for Collective Action.

"Organizing is a pedagogical practice that you have to develop a praxis on... Deepening my understanding so that I can be knowledgeable for everyone else has been important... Ultimately, I trust our workers."
— Alejandra Lopez, President, San Antonio Alliance

Part II: Union Staff Role in High Participation Locals

In high-participation local unions, the role of union staff (field representatives, organizers, and administrative staff) undergoes a fundamental transformation. Instead of acting as "third-party" service providers who directly solve individual workplace problems, staff transition into strategic coaches, capacity builders, and data-driven organizers who empower rank-and-file members to lead their own campaigns. Here is what union staff do in high-participation locals:

1. Shifting from Direct Grievance Handlers to Member Coaches

In traditional servicing models, staff spend the majority of their time managing case-by-case Level 1 grievances and representing individual members in disputes. In high-participation locals, staff step back from direct Level 1 casework and instead train, prepare, and coach site-level

member leaders to resolve these initial disputes directly with their site administrations. Staff retain responsibility only for higher-level (Level 2 or 3) grievances or highly sensitive disputes.

- As a UTLA member explains, staff responsibilities must shift:

"We were very clear with our union staff that their jobs were going to change... and it was going to go from... mostly grievance handler... to a role that had four components to it... representation, organizing, political work, and connection to community."

- Similarly, UESF, outlines how this representational shift operates in practice:

"...training and orienting members to use grievances as organizing tools, that they are responsible for their Level 1s at their own school site ..."

Structural Separation of Servicing and Field Staff: To prevent field staff from being consumed by individual representation, the San Antonio Alliance structurally divided staff duties. A dedicated Servicing Organizer handles individual representational cases, Child Protective Services (CPS) interviews, and Level 1/2 grievances. Meanwhile, Field Organizers focus exclusively on site-level campaign building, leader identification, and majoritarian fights across 86 campuses.

2. Transitioning from "Doing" to "Enabling"

In a low-participation model, staff or the local president run school site meetings, draft agendas, and personally execute local actions. In high-participation models, staff focus on producing self-directed toolkits, conducting centralized leadership trainings, and guiding members through escalating campaigns. Rather than dictating from above, staff act as coaches who respect member authority.

- UTLA trained staff to adopt specialized organizing methodologies (such as the 1199 and Jane McAlevey models) focused on building grassroots capacity:

"...your role as staff is to... Identify leaders... do a lot of listening around what their issues are... connect their issues to ways to train them to build campaigns where there's a plan to win. And help them think about escalation."

- FREA, highlights this collaborative, member-first coaching dynamic:

"We would just collaboratively make decisions. And ultimately, they [MTA organizers] always allowed me to make the final decision with my team."

3. Reorienting Data Management toward Active Organizing

Administrative and clerical staff in servicing unions typically focus on passive record-keeping, such as tracking dues applications or handling phone calls. In high-participation locals, staff transform data systems into active organizing tools—running strategic reports, mapping out school sites, tracking participation in "structure tests," and coordinating electronic wall charts.

- As UESF explains, this shift completely changes the utility of union databases:

"She [the UESF data specialist] is hyper, hyper focused on organizing... She's using the data that we have on grievances to say, like, we could be organizing around these contract articles. So... it's night and day difference on how we manage."

- In Los Angeles, UTLA's database ("OrgDB") was kept running by clerical staff entering physical petition data so that regional steering committees could utilize color-coded maps (green for high-readiness, yellow for moderate) to strategically target unorganized campuses.

4. Guiding Campaign Logistics and Writing Communication Scripts

High-participation campaigns require immense behind-the-scenes support. Staff take charge of drafting organizing scripts, designing tracking tools, and handling the complex logistics of citywide actions, community coalitions, and massive training events. Furthermore, staff take on the massive logistical work of coordinating actions across hundreds of buildings—such as ensuring picket signs, t-shirts, and food are distributed—to allow site-level member leaders to focus entirely on their coworkers.

Part III: Valley Work (The Non-Bargaining Lulls) in High Participation Locals

In high-participation local unions, organizing does not pause when a contract is signed. The "valleys"—the periods of relative calm between major contract campaigns—are treated as critical windows to reinforce union infrastructure, solve localized workplace problems, and build deep community trust. High-participation locals stay active and organized during these non-escalating lulls through several strategic focus areas:

1. Organizing Around Local Site Fights and Contract Enforcement

Instead of letting organizing systems melt away after a contract is ratified, high-participation locals immediately pivot their structures toward implementing and protecting their hard-won contract terms.

- **Contract Implementation:** After United Teachers Los Angeles (UTLA) won first-ever enforceable class size caps in its strike, the union refocused worksite visits and chapter meetings on organizing members to monitor and enforce those caps at their individual schools. They recognized that staff and officers could not monitor 900 buildings alone; implementation had to be organized from the bottom up.
- **Multi-Use Chapter Action Teams (CATs):** Originally built for strike readiness, CATs are intentionally maintained as permanent, multi-use tools to tackle day-to-day issues. Members are trained to use their 10-to-1 CAT structures to "jam up" a hostile principal's office, manage site-level disputes, or mobilize collectively during routine faculty meetings.
- **Solving Problems Collectively:** Site leaders are coached to use Level 1 grievances as active organizing tools, transforming routine contract violations into opportunities to build collective site power rather than relying on quiet, closed-door handshakes.
- **The "Whole Teacher Project" Needs Assessment:** In off-contract "valleys," the Anaheim Secondary Teachers Association (ASTA) executes an annual site-by-site

assessment called the Whole Teacher Project. Site organizing teams survey educators to identify gaps in materials, teaching conditions, and student resources, compiling a common organizing agenda that maintains worksite activation year-round.

2. Continuous Skill-Building and Contract Literacy

High-participation locals use lulls to systematically "capacitate" members, ensuring that when the next major campaign arrives, they have a highly skilled, confident, and self-directed rank-and-file foundation.

- **Rotational and Organizing-Focused Meetings:** Rather than holding dry, centralized board meetings, locals like the Beverly Teachers Association (BTA) rotate their monthly meetings through different school buildings to keep representatives connected to varying workplace realities. They use these meetings to audit school lists, welcome new hires, and practice peer-to-peer representation skills like Weingarten rights.
- **On-the-Job Trainings:** Existing union meetings (such as regional area meetings or board of governors sessions) are restructured to include hands-on campaign training. Leaders learn practical organizing skills—like site mapping, running 1-on-1 conversations, and utilizing organizing scales—directly on the job.
- **Contract Education:** The Columbus Education Association (CEA) utilizes weekly newsletters, mobile apps with push notifications, and planned virtual Zooms to continuously educate faculty representatives on how to interpret contract language regarding leaves, lesson plans, and insurance.
- **Annual Campaign Alignment and Mobile Training:** To kick off the school year and keep the organizing infrastructure active, high-participation locals, such as the Oakland Education Association, hold an annual **Leadership Conference** to align reps around the union's annual campaign plan. If a struggling building cannot travel to the union office during off-contract "valleys," regional member organizers ("super reps") physically bring organizing workshops (and pizza) directly to school libraries and lunchrooms to ensure there are no barriers to contract literacy and skill-building.

3. Intentionally Cultivating Social Life and Team Camaraderie

Because prolonged organizing can lead to exhaustion, high-participation locals recognize that union culture cannot feel entirely clinical or negative all the time.

- **Fostering Social Pockets:** BTA emphasizes the importance of tapping into existing social networks in schools—such as Friday drinks or casual off-site meetups.
- **Building Team Spirit:** Sponsoring casual celebrations, retirement parties, and welcoming new members with t-shirts helps members "feel like a team" so they can recover together from the toll of prior strikes or heavy litigation.

4. Community-Centered Defense and Coalition Organizing

When the contract campaign pauses, the union's focus often shifts outward to the broader community, reinforcing the idea that "community conditions are classroom conditions".

- **Expanding the Scope:** In Columbus, the Education Justice Coalition (CEJC) remains highly active during "down periods" by engaging in community defense work, mutual aid, neighborhood school patrols, and fighting corporate tax abatements.

- **Democratic Community Spaces:** The coalition holds regular, open community meetings to keep parents and neighbors updated on school board politics, continuing the collaborative, non-transactional trust developed during the strike.
- **Electoral Mobilization:** UTLA utilizes its CAT communication structures in off-contract years to mobilize members for school board races, precinct walking, political door-knocking, and city council campaigns.
- **How to Build an Education Justice Coalition:** This [manual](#) is a great resource for learning how to build an education Justice Coalition. The manual was developed by NEA, the Midwest Academy, and the Lift Fund.

5. Department-Specific Organizing and Caucuses

Locals keep members organized around their specific, daily professional frustrations by establishing self-governing caucuses.

- **Grassroots Professional Advocacy:** At CEA, over 200 special education teachers formed a structured Special Ed Caucus, with its own elected officers, to collectively tackle paperwork overreach and advocate for compliance solutions in collaboration with union leadership. Similar groups, like school nurses and counselors, use their local structures to organize petitions and collectively push back against administrative overreach.

6. Building Durable Community-Labor Alignments Before Crises Emerge

- **Rejecting Transactional Coalitions:** High-participation locals reject the standard "transactional coalition" model in favor of establishing permanent, durable community-labor alignment tables. In traditional union models, community outreach is treated as a temporary, last-minute tactic to build strike leverage or secure favorable school board votes. To counter a historical community perception that the union was merely a transactional body, Oakland Education Association (OEA) fundamentally restructured its community organizing framework. By actively showing up as non-transactional partners in community-led racial, social, and economic justice struggles—and framing community issues as union issues—the local fostered deep reciprocal trust, parent-student alliances, and unprecedented public solidarity on the ground. View [here](#) for a step-by-step process to achieve deep partnership with community.
- **Investing in Non-Bargaining Valleys:** High-participation locals flip this dynamic by intentionally investing resources (such as Campaign Lab grant-funded community organizers) to foster personal relationships with civil rights, immigrant defense, and environmental justice leaders during non-bargaining "valleys".
- **Establishing Mutual Trust:** By proactively supporting community-led events like civil rights rallies and voting protection forums, the union establishes itself as a trusted civic anchor rather than a narrow interest group. When a crisis inevitably strikes—such as hostile litigation targeting vulnerable students or sudden school board rollbacks—a highly organized, pre-existing community network is already in place, ready to immediately mobilize collective power and mount a unified defense.

Part IV: Bargaining in High Participation Locals

In high-participation local unions, collective bargaining undergoes a dramatic shift. Instead of treating negotiations as a closed-door "secret" handled by hired lawyers, high-participation locals transform bargaining into a highly transparent, democratized, and member-led organizing campaign. These locals structure, execute, and leverage their bargaining processes using several key strategies:

1. "Bargaining is Organizing": Treating Negotiations as a Campaign

Rather than viewing bargaining as a legalistic grammar exercise, high-participation locals treat the contract campaign as the primary engine to build, test, and activate member leadership across every school site. Negotiations are used to agitate the membership, identify new grassroots leaders, and build escalating workplace campaigns. As United Educators of San Francisco (UESF) explains:

"Bargaining is organizing. If we're only bargaining across the table, then we're only doing part of the job... the bargaining team can organize around our campaign, around our contract demands, in order to achieve them."

2. Deploying Massive, Unified, and "Silent" Bargaining Teams

High-participation locals reject small, exclusive bargaining committees. Instead, they exponentially expand their bargaining teams to represent all job titles and school sites:

- **Radical Representation:** UESF expanded its team from historical averages of 10 to 25 members up to 65, and ultimately to 120 representatives across 80+ school sites. They bargain for every certificated, classified, and substitute worker unified under a single bucket. Similarly, the Columbus Education Association (CEA) opens its large bargaining team to any member who wants to apply, provided they are not a scab.
- **Silent Representatives:** The Fall River Educators Association (FREA) utilizes a "silent representative" model, bringing 50 to 100 members directly into the negotiations room. While they remain silent across from management, silent representatives are highly active during caucuses, providing immediate feedback and site-level expertise to the core negotiating team. They also attend planning sessions to review, critique, and tweak contract proposals before they are presented to the district.
- **Bargaining Representative at Every School Site:** As mentioned earlier in the report, the Oakland Education Association (CA) dismantled its historical, closed-door bargaining model—which was restricted to a tiny, isolated team of 3 to 5 negotiators who operated under strict media-blackout ground rules—and significantly expanded its bargaining table. To ensure radical transparency, build trust, and align the rank-and-file, the local placed a trained bargaining team member at every school site. These members delivered raw, unfiltered, blow-by-blow updates directly from the negotiations room back to school-site meetings (*"and then she said, and then he said"*), transforming collective bargaining into an active, shared organizing campaign.

3. Rejecting "Respectability Politics" for Radical Transparency

Historically, unions accepted district ground rules that prohibited sharing proposals or speaking to the media. High-participation locals aggressively reject these constraints. They make all

proposals public, utilize social media, and provide direct, unvarnished updates from the negotiating room:

- **Layman's Terms:** UESF formats its contract proposals in plain language first—explicitly stating the problem, proposed solution, and rationale—before writing the dense contract language, ensuring all members can easily understand what is being fought for.
- **Direct Communication:** UESF publishes all proposals on its website and sends video updates and campaign toolkits directly to site leaders to facilitate building-level meetings.
- **Videos:** CEA demystifies negotiations by recording public video updates—humorously dubbed "hostage videos"—sitting together as a team immediately following bargaining sessions to debrief the membership.
- **Continuous Updates:** By keeping members continuously informed, leaders ensure that the final contract ratification is an extension of the campaign, rather than a surprise. FREA leadership contrasted this with traditional, closed bargaining:

"I remember getting a lot of criticism, my first bargaining team... we went to the ratification meeting, and we presented all of our agreements. And we just got slaughtered. The members shredded us. It was the first time we were presenting this stuff to them. So I guess I would tell myself that if you do it this way, um, the members are going to be more aware, um, and you're not going to get slaughtered at the ratification meeting, because they have gone through the process with you."

In their subsequent democratized bargaining campaign, FREA won a historic contract where over 80% of members voted, and 100% of them voted "Yes" to ratify.

4. Community-Centered "Common Good" Co-Power

High-participation unions align their demands with the broader community, fighting for "common good" issues like school HVAC upgrades, class-size reductions, and preventing school closures. They also break state precedents by bringing parents, students, and community members directly into the bargaining room:

- **Community Observers:** CEA and the Columbus Education Justice Coalition (CEJC) introduced community observers to contract campaigns and reopeners, a historic first in Ohio. Observers are trained on proper observation rules so they can sit in and watch the process firsthand.
- **Reciprocal Power:** While some traditional members initially push back against community involvement, leaders recognize that community trust is the ultimate shield. As CEJC Organizer highlights:

"You are stronger with the community than you were without it, and vice versa, right? Especially with CEA being the largest local in the state."

5. Demanding Concrete Leverage over "Moral Victories"

Ultimately, democratized bargaining forces the school district to reckon with organized member power rather than legalistic arguments. Locals use "structure tests"—like petitions, t-shirt days, regional rallies, and coordinated "work-to-rule light" actions—to collect real-time data on their membership's readiness to escalate. They refuse to settle for symbolic gestures, using their leverage to force concrete redistributions of district wealth into paychecks and classrooms.

Part V: Being a President of a High Participation Local

In high-participation local unions, the role of the union president shifts from being an administrative manager or a top-down decision-maker to acting as a strategic coordinator, chief political diplomat, and builder of member capacity. Union presidents in these locals drive organization-wide transformation through several key responsibilities:

1. Shifting Focus to High-Level Diplomacy and Strategic List Work

Presidents in high-participation locals step away from day-to-day casework. They no longer personally rep Level 1 building grievances, instead training site leaders to handle those disputes directly.

- **Handling Complex Cases:** The president limits direct representational work to highly complex cases—highly sensitive, high-risk, or complex situations requiring staff and/or a lawyer's diplomatic interventions to see someone out the door safely.
- **Systemic Grievances:** While presidents file major district-wide grievances or Unfair Labor Practice (ULP) charges in their own name, they rely on staff and site leaders to track and manage the administrative processing.
- **Managing the "CEO" Role:** They still handle standard administrative duties—managing staff, budgets, audits, and meeting with the school superintendent or labor council—but these are integrated into a larger organizing strategy.

2. Guarding the Strategic Plan

To overcome historical union factionalism and division, high-participation presidents run highly structured planning processes.

- **Unified Coherence:** They coordinate officers, board members, and staff to produce a clear, single strategic plan.
- **Strict Alignment:** The president acts as the gatekeeper of this roadmap. As UESF notes, the president's role is to keep meetings and resources strictly aligned to this vision:

"If it's not on the plan, it's not happening."

3. Taking "Turf" and Running Systematic Blitzes

Presidents do not stay behind their desks; they lead field mobilization by example.

- **Geographic Turf:** Presidents assign themselves specific geographic focus regions ("turf") to serve as their organizing home base.
- **Systematic Visits:** They participate in systematic school-site visits linked to the active phases of the union's campaign (such as motivating survey completion or explaining bargaining platforms).
- **Site "Blitzes":** When site-level communications break down or a building representative is struggling, the president will personally execute "blitzes"—visiting school libraries or lunchrooms to listen, agitate, educate, and speak directly with rank-and-file members to recruit new volunteer helpers.
- **Systematic President School Visits & Board Turf Assignments:** Upon taking office, ASTA President Grant Schuster spent his first 2.5 months visiting every campus for a full

day, catering lunches, and conducting 400 individual, ten-minute conversations with rank-and-file members. Furthermore, ASTA restructured its Executive Board so that board members were assigned geographic "turfs" of campuses outside their own schools, utilizing release days to systematically visit classrooms and support site reps.

4. Reallocating the Budget for Power

High-participation presidents take an aggressive, hands-on role in restructuring the union's finances.

- **Cutting Passive Costs:** They lead efforts to cut back on traditional, passive expenditures—such as sending large delegations to national union conferences.
- **Investing in Members:** They redirect those funds directly back to the membership, using the savings to purchase direct campaign resources, print t-shirts ("shirting up" the membership), purchase organizing databases, and hire additional field organizers.

5. Redefining the Relationship with District Leadership

Presidents establish a sharp boundary between themselves and the school district administration.

- **Working for the Union, Not the District:** As Beverly Teachers Association leadership emphasizes, the president must constantly remind both members and administrators that:

"...the president of the union works for the union, not for the district."

- They reject the expectation that their job is to help HR run the district or solve management's logistical headaches.
- **Focusing on Concrete Leverage:** They reject "respectability politics" and passive, closed-door negotiations in favor of building public member pressure. As CEA leadership argues, the president's goal must be to move past symbolic "moral victories" and use collective strength to win concrete contract terms.

6. Distributing Leadership and Decisions

High-participation presidents recognize that overworking themselves erodes the union's sustainability.

- **Delegating Campaigns:** Rather than trying to personally lead every committee, the president actively delegates. For example, when Beverly Teachers Association launched a community-based special education coalition, the president participated but intentionally stepped back to let organic rank-and-file experts chair and run the committee.
- **Multi-Officer Release Models:** High-participation presidents actively dismantle the "centralized officer bottleneck" where the president personally handles all daily crises. Instead, if possible, the local expands its full-time release team (e.g., a three-officer model) to distribute high-level responsibilities: one officer dedicated to internal organizing and list-work, another coordinating family and student coalitions, and a treasurer managing an "organizing budget" to directly fund site campaigns. To accomplish this, locals have increased their local dues.
- **Collaborative Final Decisions:** As a full-release leader, the president remains in daily contact with staff and field representatives. However, as FREA's leadership notes, they

prioritize collaborative, team-based decision-making so that the union's power is never built around a single, fragile individual:

"We're building something that's not based on an individual, it's a team, and it can keep going."

Part VI: How High Participation Locals Use Data to Build Power

1. Reorienting Data Management from Passive Tracking to Active Organizing

Traditional servicing unions typically view databases as administrative filing cabinets used for passive record-keeping, such as verifying dues applications, tracking membership cards, or logging phone calls. High-participation locals fundamentally transform these systems into active organizing tools that guide strategic, on-the-ground campaigns. Rather than merely tracking compliance, administrative data specialists actively analyze grievances, contract violations, and member rosters to detect district-wide trends and target organizing around specific contract articles. As UESF leadership notes of their data specialist:

"She is hyper, hyper focused on organizing... She's using the data that we have on grievances to say, like, we could be organizing around these contract articles. So... it's night and day difference on how we manage."

2. Decentralized, Grassroots Data Collection and Entry

Instead of relying on a centralized, top-down data entry bottleneck, high-participation locals decentralize data collection down to the school-site level. Chapter Chairs, Contract Action Team (CAT) representatives, and Area Steering Committee leaders are trained to log engagement metrics directly. This grassroots data collection includes logging real-time member turnout at building meetings, contract platform votes, signed petition counts, action pledge forms, and strike authorizations. At UTLA, for example, the district's ~940 school sites are divided into geographic "clusters," with each steering member assigned to manage and log data for their specific school cluster.

3. Site Mapping and Electronic Wall-Charting

To make data directly useful to frontline educators, high-participation locals utilize mobile-friendly database applications like Action Builder (used by UESF) or OrgDB (developed in-house by UTLA). Site leaders use these platforms for digital wall-charting to visually map out their physical campuses, departments, or grade levels. This mapping enables representatives to view real-time engagement data, instantly identify which wings or departments are unengaged, and target their one-on-one outreach to unorganized coworkers. As a representative discovers that a specific section of their campus has not signed a campaign petition, they can immediately assign a CAT leader to conduct structured organizing conversations in that area.

High-participation databases (such as OEA's proprietary *OEADB* or UTLA's *OrgDB*) are used by regional member organizers to dynamically monitor structure tests. If a school site's participation data is missing during an action, regional "super reps" instantly use the database to diagnose whether the issue is a weak site representative who needs hands-on coaching, or if the campaign message requires more robust political education.

4. Quantitative "Gates" and Campaign Readiness Assessments

High-participation locals reject guesswork and "hope" when preparing for major escalations, relying instead on data collected through physical "structure tests" to measure actual member leverage. These locals systematically assess every coworker on a 0-to-5 organizing scale to measure their strike or campaign readiness. Databases then aggregate these individual assessments into color-coded school readiness maps and real-time dashboards. Typically, chapters are coded green for high readiness (exceeding 85% support) and yellow for moderate readiness (above 60%), allowing regional steering committees to immediately deploy resources and organizer support to struggling buildings. This data serves as a quantitative "gate" to determine whether the membership is ready to escalate a campaign to the next level—such as moving from a public petition to a synchronized practice picket, and ultimately, a strike authorization vote.

5. Moving to Fully Autonomous, Self-Directed Actions

By tracking structure tests visually, locals can systematically transition from a "high-touch," staff-heavy support model to fully synchronized, self-directed campaigns. In the early phases of a campaign, staff and officers physically visit school sites to model actions and distribute materials. However, as site leaders are capacitated in using digital tracking tools, the union shifts to low-touch, synchronized actions where hundreds of sites run their campaigns autonomously. During UESF's final practice picket structure test, every school site executed its picket simultaneously, independent of staff presence, and uploaded photo evidence and sign-in sheets directly into the database. As UESF leadership reflects:

"In order to pull that off, you can't be high touch. It's all self-directed. So that's where our phases came in... it went from us being at your school site to have a meeting with you... to Kyle's on the Zoom because he signed into it."

6. Physical Petitions Over Online Clicks

Despite the shift to digital data tracking, high-participation locals maintain a strong preference for physical, paper petitions over passive online links. While digital systems are used to log the final outcomes, the actual act of signing a physical petition requires face-to-face, one-on-one organizing conversations on the job. Furthermore, a physical sheet allows workers to see their own colleagues' signatures side-by-side, creating powerful visual proof of solidarity and building collective confidence across the campus.

Part VII: How High Participation Locals Train Their Members

Building a high-participation union is a rigorous, technical craft that requires continuous, systematic training. High-participation locals recognize that member apathy is often just a symptom of a lack of organizing skills. To transition the "metacognitive load" of organizing onto the rank-and-file, unions must invest in robust, scalable training pipelines that teach everyday members how to analyze power and build supermajorities.

Rather than relying on dry, passive lectures or static reading lists, high-participation locals utilize active, learner-centered organizing pedagogy across four core, highly practical areas.

1. The Gradual Release Model: From On-Site Modeling to Autonomous Campaigns

Rather than throwing newly recruited site leaders directly into high-stakes contract escalations, high-participation locals utilize a structured, "gradual release" training framework that systematically moves members from high-touch staff dependency to completely self-directed collective actions.

- **The High-Touch Phase (On-Site Modeling):** In the early years of a culture-shift, union officers and staff conduct frequent worksite visits (3 to 4 times per week) to directly identify potential leaders, audit lists, and model face-to-face conversations. For example, during early practice picket training at the **United Educators of San Francisco (UESF)**, officers physically showed up at individual schools at 7:00 AM and 3:00 PM with picket signs, bullhorns, and instruction toolkits to run the standouts alongside hesitant site leaders.
- **Technological Capacitation & Site Mapping:** Leaders receive targeted, hands-on training (via Zoom or direct school-site visits) on mobile-friendly organizing databases. At UESF, site leaders were trained on *Action Builder* for electronic wall-charting. At the **United Teachers of Los Angeles (UTLA)**, the strategic research department hosted dedicated hands-on workshops at their annual Leadership Conference where new steering members brought their laptops, received custom logins, and were walked through their proprietary *OrgDB* system. They learned how to map physical school wings, track local petition signatures, and log member assessments.
- **The Semi-Autonomous Phase:** Once local structures are built, staff step back. During UESF's second round of practice pickets, individual school sites chose their own schedules. Staff merely dropped off signs and materials, while union officers drove between campuses to honk in support, take photo evidence, and track participation from their vehicles.
- **Fully Synchronized, Self-Directed Actions:** The ultimate goal of the training progression is completely autonomous member execution. During UESF's final practice picket structure test, every school site executed its picket simultaneously on the exact same day at the exact same time. Sites ran the pickets independently without staff oversight and uploaded their own photo reports and sign-in sheets directly into *Action Builder*. As UESF President Cassondra Curiel reflects:

"In order to pull that off, you can't be high touch. It's all self-directed. So that's where our phases came in... it went from us being at your school site to have a meeting with you... to Kyle's on the Zoom because he signed into it."

2. The "Skills to Win" Core Organizing Curriculum

Partnering with premier labor training institutions like the **UC Berkeley Labor Center**, high-participation locals ground their member education in the rigorous, structured "Skills to Win" curriculum. This framework, originally developed by Dr. Jane McAlevey, equips everyday educators with three foundational competencies:

- **Leadership Identification:** Members are trained to systematically identify "organic" or "natural" leaders who possess inherent social influence over their peers—distinguishing them from pre-existing, highly visible union activists. This training was a crucial turning point for the **Oakland Education Association (OEA)**; a core cohort of OEA leaders began a systematic book study of McAlevey's *No Shortcuts* at the Berkeley Labor Center,

using leadership identification to build the necessary worksite power for their historic 2019 strike.

- **Effective Organizing Conversations:** Site leaders are taught to move past superficial card-chasing and master a structured, six-step organizing conversation model. The training focuses on precise communication semantics, intentional listening (the 80/20 listening rule), and agitation techniques designed to help members overcome their own fears and recruit hard-to-reach colleagues.
- **Structural Assessments and Charting:** Leaders learn how to visually represent their workplace through physical "wall charting". By mapping out the social and professional connections on a campus, they can track real-time participation in escalating "structure tests" (such as sticker days, petition drives, and wear-red actions) to mathematically measure their actual union leverage. For example, the **Student North Carolina Association of Educators (AE NCAE)** deployed in-person academies in Charlotte and New Orleans to teach these direct, face-to-face recruitment and charting tactics to student leaders, transforming their statewide governance. Similarly, the **Lawrence Education Association (IN)** used these tools to distinguish between running internal structure-building campaigns and external issue-based campaigns, facilitating the adoption of their first-ever strategic plan.

3. Bypassing Barriers: Mobile, On-Site, and Rotational Training

Because educators are severely overworked and balance demanding personal lives, high-participation locals completely restructure when, where, and how training is delivered to ensure zero barriers to entry:

- **Annual Strategic Alignment:** Locals hold an annual, start-of-the-year **Leadership Conference** to align building representatives around the union's annual campaign plan. At **OEA**, this conference kicks off the school year and gives reps a shared foundation, ensuring that every representative understands the campaign roadmap before students enter classrooms.
- **Mobile "Pizza and Library" Workshops:** High-participation locals recognize that a struggling school site may not have the capacity to travel to the central union office for workshops. To overcome this, **OEA** regional member organizers ("super reps") physically bring the organizing workshops—and pizza—directly to school libraries or lunchrooms, meeting educators in their own environments immediately after their contract day ends.
- **Rotational Meeting Models:** To break down isolation and keep leadership grounded, the **Beverly Teachers Association (BTA)** in Massachusetts rotates its monthly representative council meetings through different school buildings across the district. This practice keeps leaders exposed to varying workplace realities, while the meeting time itself is used for active, hands-on organizing work—such as auditing building lists, practicing Weingarten representation, and role-playing one-on-one conversation scripts—rather than merely reading dry reports.
- **Mass Centralized Strategy ("Strike Academies"):** To prepare site leaders for major contract escalations, locals host large-scale, centralized trainings. **UESF** hosted its "Strike Academy" at the California Teachers Association (CTA) headquarters in Burlingame. Co-facilitated with multiple regional unions, the academy brought site leaders together with peer labor organizations to align escalation tactics and build collective confidence.

While organizers originally anticipated 80 to 100 school sites, nearly every single school site attended alongside 200 additional rank-and-file members, totaling over 300 participants.

- **Bargaining Observation and "Hostage Videos":** The **Columbus Education Association (CEA)** trains members on proper observation protocols so they can sit in on live contract negotiations and understand the bargaining process firsthand. To further demystify the process for the broader membership, CEA records public video updates—humorously dubbed "hostage videos"—sitting together as a bargaining team immediately following sessions to debrief members on contract language and district counterproposals.

4. Case Study: Chicago Teachers Union (CTU) Training Infrastructure & Leadership Pipeline

To build and sustain a high-participation organizing local, the Chicago Teachers Union (CTU) developed a comprehensive, multi-tiered training ecosystem. Rather than treating member education as a passive, administrative requirement, CTU uses training to systematically de-center top-down leadership, equip rank-and-file educators with hard organizing skills, and build a continuous pipeline of worksite leaders.

1. The Cornerstone: The Annual 4-Week Summer Organizing Institute

CTU's primary engine for leadership development and organizational transformation is its intensive Summer Organizing Institute:

- **Selective & Proportional Recruitment:** Admission to the 4-week summer program is a competitive application process. CTU carefully selects a diverse cohort that reflects the broader bargaining unit across job titles (certificated teachers and Education Support Professionals), race, gender, age, and geography.
- **Political Education & Core Curriculum:** Participants complete a deep dive into union history, power analysis, the Sustainable Community Schools model, and seminal organizing texts—such as Martin Luther King Jr.'s *Letter from Birmingham Jail*.
- **Methodical Skill-Building:** Members master the mechanics of the Structured Organizing Conversation (SOC). They are trained in active listening, precise communication semantics, identifying organic leaders, and agitating colleagues to polarize the source of workplace problems and make collective commitments.
- **Fieldwork & Action Plans:** Training is directly paired with field application. Members knock on member doors, run community forums, and design a concrete, worksite organizing project to execute at their school in the fall.
- **A Proven Leadership Pipeline:** The institute acts as CTU's primary internal pipeline. Graduates systematically advance to become school delegates, District Organizers, Executive Board members, and full-time union officers. Notably, Chicago Mayor Brandon Johnson was originally recruited and trained out of CTU's inaugural 2011 summer organizing cohort.

2. Specialized, Low-Barrier Skill Development

To supplement the Summer Institute, CTU embeds skill-building into the regular rhythm of the union calendar, removing barriers to participation:

- Biannual Released Delegate Trainings: CTU negotiated contract language guaranteeing one full day of paid release time per year for building delegates. Held at union headquarters or local school sites rather than expensive hotels, these two annual sessions bring hundreds of delegates together to workshop real-world campaign plans, analyze workplace culture, and practice dispute resolution.
- PPC "Boot Camps": For school-site Professional Problems Committees (PPCs) facing severe workplace friction or abusive administrators, CTU hosts targeted "PPC Boot Camps". Site teams troubleshoot confrontational dynamics alongside experienced organizers, map out escalation plans, and divide up workload tasks so individual delegates do not martyr themselves.
- Lobby Day "Bus Trainings": CTU converts transit time into educational opportunities. During 3-hour bus rides to the state capitol in Springfield for lobby days, organizers facilitate interactive workshops on navigating legislative deflection, framing demands, and delivering effective political messaging.
- Assembly Mini-Trainings & Storytelling: Monthly Delegate Assemblies (averaging 700+ delegates) feature 10-to-15-minute tactical modules. Assemblies actively showcase real worksite victories—such as science teachers simultaneously wearing lab coats to win missing equipment or staff wearing shorts to break an arbitrary dress code—to demystify action and build majoritarian confidence.

3. "Inquisitive" Majoritarian Organizing Methodology

CTU explicitly trains organizers and site leads to move past passive servicing and avoid being misled by the "squeaky wheel":

- Overcoming Workplace Fear: CTU brought in organizers with private-sector and community organizing backgrounds to train members on assessing and taking calculated risks rather than shutting down necessary workplace fights.
- Focusing on Majoritarian Issues: Site leaders are coached to disrupt meetings productively by asking "inquisitive" questions that surface widely and deeply felt issues—such as class-size overreach, mold, broken HVAC systems, or lack of prep time—ensuring the union organizes around problems that unite the entire building.

"Organizers must be inquisitive... It's not the person that is the squeaky wheel. If they're the only one saying they need expo markers and everybody else in the room is quiet, there's a problem... Ask, 'Do a majority of you have class size issues? Are you worried about mold?' Having that as your modus operandi will get you much further in activating members." — Jackson Potter, Vice President, Chicago Teachers Union¹

Part VIII: Overcoming "Respectability Politics" and the Fear of Conflict

High-participation local unions understand that a barrier to rank-and-file engagement is not a lack of interest, but a deeply socialized aversion to workplace conflict. Educators and caregivers naturally desire safe, cooperative, and comfortable environments. Traditional, low-participation unions exploit this desire by promoting "**respectability politics**"—the belief that civilized,

¹ CTU is not in the Campaign Lab. NEA interviewed CTU to contribute to our knowledge of what it takes to move from low participation to high participation.

closed-door labor-management meetings can resolve structural disputes through polite persuasion. High-participation locals systematically reject this framing, recognizing that respectability politics is an administrative trap designed to isolate disputes and disarm collective leverage.

1. The Trap of "Civilized" Problem-Solving

When local leaders attempt to resolve systemic workplace grievances through quiet, backroom handshakes, they reinforce the "self-third-partying" of the union. This approach keeps conflicts hidden in a vacuum, preventing members from realizing their shared strength. Beverly Teachers Association (BTA) leadership observes, unless a local has been burned by respectable, closed-door committees, members may struggle to accept that administrative compliance only occurs when confronted with raw, collective pressure:

"We do not work for the boss. We are not there to solve the boss's problems... Just because something's on paper, I can bring it to the boss and explain it, and then nothing can happen. No one's heard it. It's in a vacuum, it's a total waste. It feels like you're supposed to do it that way, though, there's like this idea of respectability politics... And unless you've done that and been burned a couple of times, you might not really believe that, yes, the only way to really make that principal fix this problem is if 50 people show up at her door and say, 'Today's the day, we're not taking it anymore.'"

2. Moving Past "Moral Victories"

In a low-participation model, progressive factions often settle for symbolic, public protests that result in nothing more than "**moral victories**". High-participation locals train their leadership to pivot away from symbolic gestures and focus strictly on concrete demands backed by escalating structure tests.

3. Combating the Fear of Authority

Because challenging district administrators can feel unnatural and high-risk, high-participation locals utilize their **10-to-1 Chapter Action Team (CAT)** (also called other names throughout this report) communication trees to dismantle fear. Site leaders do not ask members to stand alone. By organizing visible, unified school-site actions—such as synchronized standouts, coordinated wear-red days, or mass administrative office visits—the local establishes a protective shield of solidarity. This physical demonstration of numbers transforms the act of challenging authority from an isolated, terrifying risk into a shared, empowering exercise.

Part IX: Defensive Organizing & Anti-Authoritarian Protection

A high-participation local does not dismantle its organizing infrastructure when a contract is ratified; instead, it repurposes its permanent, school-site communication networks to defend the community against civil rights, political, and legal threats. When local school boards, immigrant families, or vulnerable students come under attack from hostile state or federal policies, high-participation unions leverage their **Chapter Action Teams (CATs)** and database mapping tools to launch immediate, highly coordinated community defense campaigns.

1. Repurposing Strike Machinery for Deportation and ICE Defense

Because "community conditions are classroom conditions," high-participation locals refuse to separate workplace advocacy from immigrant justice.

- The **St. Paul Federation of Educators (MN)** successfully repurposed its existing strike mobilization machinery into a rapid-response ICE defense network, utilizing automated forms to route volunteers across 70 school buildings.
- The **Denver Classroom Teachers Association (DCTA)** partnered with a coalition of 15 community organizations to form the *Protecting Denver Students and Families* initiative. The union trained rank-and-file members as official "Confirmers" with the Colorado Rapid Response Network, established active school community patrols, and conducted non-violent direct action trainings to protect families from federal overreach.
- **United Teachers Los Angeles (UTLA)** utilized its custom database (**OrgDB**) and regional steering clusters to coordinate first-day back-to-school resource actions. The local established a Valley satellite office specifically to counter heavy ICE activity and protect immigrant student populations in the San Fernando Valley.

2. Rapid-Response Defense of LGBTQ+ and Transgender Youth

When federal or state administrative actions target vulnerable student populations, high-participation locals utilize their decentralized site structures to mount an immediate defense.

- Following a federal lawsuit challenging trans-inclusive student policies in Maryland, the **Teachers Association of Anne Arundel County (TAAAC)** demonstrated powerful defensive organizing. Within 48 hours of the policy challenge, rank-and-file members bypasses slow administrative channels, distributed safe-space classroom stickers, and mobilized school staff to visually signal protection to transgender youth.

3. Tabletop Simulations and Election Protection

Preparing for advanced political crises requires proactive, skill-based scenario planning.

- **TAAAC (MD)** co-facilitated "Solidarity Schools" where labor, civil rights, and community organizers engaged in structured tabletop exercises simulating various election interference scenarios. These sessions trained community partners and union members in physical de-escalation, safe-voter escorts, and rapid-response communications to safeguard democratic participation.
- **DCTA's (CO)** May Day Committee and the *United Denver* community coalition co-developed a "Build and Block" strategy, integrating *Skills to Win* training with localized election protection plans to secure voting sites and resist authoritarian incursions on public education.

Part X: The Strategic Plan—Guarding the Roadmap and Building Coherence

The transition from a passive "service model" to a high-participation organizing model requires local unions to move away from reactive, crisis-driven decision-making and embrace rigorous, long-term strategic planning. Across the most successful high-participation affiliates evaluated by the Campaign Lab, the development, co-creation, and strict enforcement of a unified strategic plan serves as the indispensable structural foundation for building collective power.

Without this clear roadmap, local leadership teams routinely default to administrative firefighting, allowing daily operational crises to crowd out the proactive, quiet work of worksite organizing and leadership development.

1. Shifting from Reactive Crisis Management to Long-Term Vision

In low-participation servicing unions, leadership and staff operate as transactional problem-solvers, responding in an ad-hoc manner to whatever grievance or administrative crisis arises. High-participation locals systematically break this bottleneck by using a structured planning process to carve out sacred spaces for strategic thinking.

- **The "Important but Never Urgent" Dilemma:** In local union leadership, long-range planning is frequently the first thing sacrificed when daily crises emerge. JCTA leadership articulated this chronic problem, noting that strategic planning "is one of those things that's really important but never really urgent when it comes to union work". She explained that locals constantly "spin plates" and "get caught up in doing all the stuff that has to be done right now" (like immediate contract deadlines or legislative lobbying), meaning that long-term infrastructure and planning fall by the wayside unless a structured program forces that dedicated space.
- **Distinguishing Structure-Building from Issue Campaigns:** A major breakthrough for locals adopting a strategic plan is learning how to categorize their work so they do not exhaust members. Lawrence Education Association (IN) leadership highlighted that their strategic planning process helped leadership understand "the critical operational difference between running internal campaigns (structure building) and running external issue campaigns". Her team realized that lasting wins require a plan that builds "stronger member structures, leadership pipelines, and engagement systems" before attempting to execute major public victories.
- **Adopting the First Local Roadmap:** For many locals, the creation of this document is a monumental organizational milestone. Lawrence Education Association (IN) leadership highlighted this shift, stating, "One of the biggest accomplishments that we got completed was the adoption, creation and adoption of a strategic plan. That was huge. We didn't have one for our local".

2. Democratizing the Planning Process to Build Mass Ownership

A strategic plan in a high-participation local is not a top-down mandate handed down by a centralized executive board; it is a democratized, co-created document built on member and community feedback.

- **Rank-and-File Input Sessions:** In San Francisco, the United Educators of San Francisco (UESF) constructed their organizing plan in the same collaborative manner they run their bargains. UESF invited rank-and-file members, school-site leaders, and the elected executive board to provide direct feedback and debrief past campaigns to co-create their strategic plan. As UESF leadership explained, "the level of participation is directly equal to the level of understanding. The more participation, the more understanding, the more you understand, the more you participate...".
- **Concise "One-Pager" Coherence:** United Teachers Los Angeles (UTLA) established a regular planning cycle involving the 7 full-time release officers, the 46 elected board members, and union program steering. To prevent internal union factionalism and ensure

"unified execution," the final product of this intensive process was distilled into a concise, one-page strategic plan. This one-pager was distributed to every single member and site leader, keeping all 39,000 members visually and strategically aligned around the exact same union program.

- **Aligning the Team Through Annual Launch Points:** To ensure that site-level leaders understand the unified campaign roadmap before the school year begins, locals establish annual strategic alignment meetings. Oakland Education Association leadership emphasized that without a structured annual Leadership Conference to kick off the school year, "it's hard for people to understand what the whole campaign plan is...for the year without having this structure". This annual alignment provides site leaders with a shared foundation so they "know what we know" and can execute campaigns in lockstep.

3. Systematizing Worksite Visits and Moving Away from the "Vending Machine" Model

Before implementing systematic strategic planning, visits to school sites are often ad-hoc, reactive, or electoral.

- **Ending "Random" Worksite Visits:** UTLA noted that prior to 2014, officer school visits were often "random"—sparked only because a building had a specific crisis or because leadership wanted to secure local votes. Under a unified strategic plan, worksite visits become highly systematic because "worksite visits and discussions are tied to where you are in the union program that has been [articulated] within the strategic plan" (such as systematically driving bargaining survey participation, then holding platform votes, then executing escalating actions).
- **Moving Away from the "Vending Machine" Model:** Multiple leaders noted that a strategic plan is the primary vehicle for shifting member consciousness. Summit Education Association (CO) leadership emphasized that utilizing Campaign Lab strategic planning and power mapping tools was what finally allowed his local to shift away from the passive "vending machine model" of unionism—where members pay dues and expect staff to "fix" problems—and toward taking collective ownership.

4. The President as the Gatekeeper: "If It's Not on the Plan, It's Not Happening"

- Once a strategic plan is established, the role of the local president shifts from administrative manager to the relentless guardian of the roadmap. High-participation presidents coordinate all staff, officers, and resources to align strictly with the plan's goals, actively cutting passive expenditures (such as massive delegations to national conferences) to reallocate funds directly into organizing capacity and member-led site campaigns.
- As UESF leadership explicitly noted regarding this operational discipline, the president's role is to keep meetings and resources strictly aligned to the collective vision: **"If it's not on the plan, it's not happening"**.

Part XI: Methodical Structure Tests — Measuring Member Readiness to Build Supermajority Power

Transitioning a local union from a servicing model to a high-participation organizing model requires replacing guesswork, hope, and top-down assumptions with rigorous, data-driven

structure tests. A structure test is an escalating, quantifiable workplace action designed to measure the actual strength, coverage, and readiness of a union's internal organizing structure (such as Contract Action Teams, Site Organizing Squads, or building stewards) before escalating a campaign.

High-participation locals understand that winning major contract demands, stopping administrative overreach, or executing strike authorization drives requires building active supermajority participation (typically 70%–80%+ active engagement or 85%+ readiness thresholds). Rather than jumping directly into high-stakes conflicts, these locals deploy a disciplined sequence of structure tests to evaluate member leverage, identify unorganized campus wings, and build collective confidence.

I. Core Principles of High-Participation Structure Tests

- **Testing the Structure, Not Just the Issue:** A structure test evaluates the health of the 10-to-1 organizing structure. If a school site fails to turn in petition signatures or photo evidence, regional organizers and local officers do not blame member apathy; instead, they use the missing data to diagnose whether the campus lacks a functional site lead or if the campaign messaging requires deeper political education.
- **Physical Paper and Face-to-Face Conversations Over Online Clicks:** High-participation locals explicitly prioritize physical paper petitions and hand-signed pledges over passive digital forms or online links. Signing a physical sheet requires a face-to-face Structured Organizing Conversation (SOC) on the job, allowing members to see their coworkers' signatures side-by-side, which builds visual proof of solidarity and collective confidence.
- **Quantitative Gates for Campaign Escalation:** Structure test results function as mathematical "gates" that determine whether a union is ready to move to the next phase of a campaign. If a structure test fails to reach majoritarian thresholds, leadership pauses escalation to reinforce site-level structures rather than risking an under-supported action.
- **The Gradual Release Training Model:** Structure tests are used to systematically transition members from staff dependency to complete self-direction. Early structure tests involve high-touch staff modeling (dropping off signs, co-leading site meetings), while mature structure tests are executed autonomously and simultaneously across all worksites without staff presence.

II. The Escalation Sequence: Case Examples from the Field

1. Minneapolis Federation of Educators (MFE Local 59) — The 5-Step Structure Test Progression

To transition from a staff-dependent local into a strike-ready union, MFE Local 59 established a 9-month sequence of four to five concrete structure tests leading up to contract expiration:

- **Step 1: Bargaining Needs Survey:** Site CAT leads distribute the survey and track completion rates against building rosters.
- **Step 2: Hand Petition / Platform Pledge:** A physical, site-level petition where members pledge support for core bargaining demands.
- **Step 3: Coordinated Dress / Button / Photo Action Day:** Members wear union buttons or hold agitational signs pointing out district budget inequities, uploading photo evidence to a central database.

- Step 4: Strike Vote Pledge: CAT leads conduct 1:1 face-to-face conversations to secure signed individual commitments promising to vote "Yes" on a strike authorization.
- Step 5: Formal Strike Authorization Vote: The final quantitative test of member leverage.

Quantitative Outcome: Through this methodical CAT-driven progression, MFE achieved over 90% member participation and over 90% "Yes" votes across every strike authorization vote taken across both its teacher and classified (ESP) chapters.

2. United Educators of San Francisco (UESF) — The Three-Stage Practice Picket Arc

UESF utilized practice pickets as an escalating structure test to measure worksite autonomy and build strike readiness across 80+ school sites:

- Stage 1 (High-Touch Phase): Roughly 60 school sites held pickets on staggered days. Union officers and staff physically showed up at individual campuses at 7:00 AM and 3:00 PM with picket signs, bullhorns, and instruction toolkits to run standouts alongside hesitant site leads.
- Stage 2 (Semi-Autonomous Phase): School sites selected their own schedules. Staff merely dropped off materials in advance, while officers drove between campuses to honk in support, take photo evidence, and log participation data into *Action Builder*.
- Stage 3 (Fully Synchronized & Self-Directed Phase): Every school site across the district was required to execute a practice picket simultaneously on the exact same day at the exact same time. Sites operated completely independently without staff oversight, uploading sign-in sheets and photo reports directly into the database.

"In order to pull that off, you can't be high touch. It's all self-directed."

— Cassondra Curiel, President, United Educators of San Francisco

3. United Teachers Los Angeles (UTLA) — OrgDB and the 2015 Dues Card Lesson

UTLA built a custom database application (*OrgDB*) specifically to track structure tests across its ~940 school sites, dividing campuses into regional clusters managed by Area Steering Committee leaders:

- Tracking Structure Tests: Chapter chairs and steering leads log real-time participation in sticker days, first-day flyering, public petitions, and meeting sign-ins into *OrgDB*. The database aggregates individual 0-to-5 organizer ratings into color-coded school readiness maps (green for >85% readiness, yellow for >60%).
- Avoiding Premature Escalation (The 2015 Dues Card Test): During UTLA's 2015 contract campaign, the union executed a structure test using an individual card drive asking members what they were willing to do to win the contract, up to and including striking. The test revealed that the union only reached 36% member participation. Rather than ignoring the data or charging into an under-supported strike, leadership recognized they lacked majoritarian power, settled the contract, and spent the next three years systematically building Chapter Action Teams to achieve supermajority readiness for their historic 2019 strike.