

# ORGANIZING FOR ACTION

PLANNING GUIDE FOR  
STRIKES & WALKOUTS

## **NATIONAL EDUCATION ASSOCIATION**

The National Education Association is the nation's largest professional employee organization, representing more than 3 million elementary and secondary teachers, higher education faculty, education support professionals, school administrators, retired educators and students preparing to become teachers.

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# ORGANIZING FOR ACTION

## A Planning Guide for Strikes and Walkouts

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# INTRODUCTION



When we take time and build meaningful and deep rank-and-file member and community engagement, it expands the possibility of what can be achieved at the bargaining table, state legislature, and workplace. Most importantly, if a campaign plan includes a strike or walk-out as a tactic, it should be part of the local or state union's larger campaign plan to build power and achieve goals that benefit our members and their students. A strike or walk out for public education is a moment when educators, parents, and communities can come together to reject the war on public education and serve up a new narrative about the promise of public schools as pillars of democracy, communities, and racial and economic justice.

This manual is designed to share useful information from NEA affiliates that went on strike or took labor action in recent years. We highlight advice, templates, and tools to use in the field. Use this planning guide as a starting point to amplify how your affiliate conducts strikes or walk-outs, or to help you consider doing so for the first time. Consult with your state staff colleagues and legal counsel to help interpret advice to match local and state laws.

Our job as a 21<sup>st</sup> century union is to encourage our members to re-think how they engage every member, at every level. We must help lift our members' aspirations as well as inspire them with innovative stories from other affiliates who've transformed their unions and work to improve their schools and better support the students they serve in new ways.

The key to success is to encourage local unions to start organizing well before a bargaining crisis or emergency arises. Union-building should be year-round work that builds upon itself. The more time we can provide for base-building, the stronger our campaigns and unions will become. Local leaders, building representatives, and staff should all plan to work together on base-building. We also know that organizing efforts cannot rely solely on the availability of the UniServ Director or staff organizer. It is not sustainable for staff or local unions. Capacity building is essential for re-building our labor movement, which is why it's everyone's job and in everyone's interest to help.





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# CHAPTER 1:

## BUILDING CAPACITY

**A strike or walk-out is never the ultimate goal of a union.** It is a tactical moment within a larger campaign to build power and achieve goals that benefits members and their students. When bargaining commences or a legislative session begins, it is also impossible to predict if a strike will be needed at some point to bring about a settlement or statewide resolution to improve working and learning conditions. This chapter and larger guide explores how to put in place the building blocks to move any local or statewide union towards a successful strike or labor action.

### Structural Pieces

#### Expanding and Sharing Leadership Before the Crisis

Local unions contain a traditional leadership model — officers and building or chapter representatives elected to be the communicators, member recruiters, and grievance (if applicable) handlers. In some cases, local union roles go uncontested or even unfilled. In order to win, we need strong leaders at the helm and in every worksite.

**Before embarking on any crisis campaign, conduct a leadership assessment:** who does most of the work, and consider if they have the skill, capacity and natural following within the union to effectively lead the campaign. Some **leadership assessment questions**<sup>1</sup> to consider include:

- ➔ Does the leader have a large following among the members and/or the community? Who is in that following? Does that following reflect the full membership? If not, who is missing and should be included?
- ➔ Who do members say are the trusted and respected leaders within their school or worksite?
- ➔ Are there chronic leadership vacancies in certain departments/categories? Why?
- ➔ What are the strengths and weaknesses of current leaders' skills? What skills are needed to win this campaign? Do they match?
- ➔ Do the current leaders have the ability to face the stress of a potential local or statewide strike?



### TIP:

Consider using a simple member-to-member canvas or “blitz” to gather information on who the respected and natural leaders are in a worksite and map the results. Also use the canvas to determine what skills sets exist within the larger membership that can align with the campaign and to learn what issues are priorities among members. For more resources, look at the Membership Blitz Organizing Packet in the resource section.

<sup>1</sup> See the Local Assessment Tool OEA.doc and Local Self-Assessment Manual OEA.doc from Ohio Education Association (OEA) and the Self-Leadership Analysis Tool VTNEA.pdf from Vermont-NEA developed based on another OEA tool in the resource section. Also see the NEA Leadership Competencies Guide for more guidance and a self-assessment tool for leaders: <http://www.nea.org/home/68203.htm>.

As we gear up, we know that we will need more leaders and member activists engaged. If we assess our current leadership and member engagement, we'll be able to see the gaps and the places that we will need to focus on in order to have strong leaders in every piece of the plan.

Every union requires different pre-work to prepare for a crisis campaign and/or eventual strike. Sometimes a union knows since the last round of bargaining or legislative session that a job action may be a necessary tactic to use in the future, and this can allow more time to build up capacity. In other cases, unions do not have much time to plan and must do the best they can to get the members ready. Use a committee structure that works for the union and the available timeline.

**Begin by forming an organizing committee early in the crisis campaign with a clear focus on recruiting new members, building member engagement and designing the pieces of the campaign.** Encourage officers to establish a budget and empower the committee to act with a certain level of authority. Every decision does not need to be run by the executive committee. Members should feel empowered, effective and trusted to act on behalf of their union. Work together to outline the specific roles and authority of the organizing committee as well as the officers. Clarify what decisions must be reviewed and approved by the executive committee (ex: media message = YES, expenditures over \$250 = YES, slogans = NO).

In most cases, seek out more leaders to step forward to form the **organizing committee** rather than drawing from existing elected leaders. This shares the work and expands member ownership of the crisis campaign. The regular work of the union must continue while campaign-specific organizing work begins.

### **Every Organizing Committee**

Here are benchmarks to consider when forming any organizing committee:

- ➔ **Recruitment.** Scale the size of the committee to reflect the demographics, grade levels, job categories, departments, worksites, and years of service reflected in our membership. Make an effort to intentionally recruit early career educators and members of color to the committee.
- ➔ **Leadership.** Elected leaders can serve on the committee, but it is important to make room for new leaders to emerge. The chair of the committee can be a liaison to elected leaders. As the committee completes its work, always be on the lookout for potential leaders within the membership and community.

### **Essential Organizing Committee**

Forming an organizing committee starts with a couple of members who consider themselves to be a people person and love to talk to other educators. Find 5 to 10 members who are trusted and respected by their colleagues and have existing relationships within the union and the community. Invite them to create an organizing committee with a pre-crisis campaign and pre-strike focus. Here are specific benchmarks to consider:

- ➔ **Purpose.** Charge the committee with *learning* about our union. Topics could include: identifying new leaders within some or all buildings, identifying and assessing priority issues among members in the workplace to inform bargaining proposals, building membership, and taking small actions together. To explore more details on how to map a workplace, identify new leaders, and build an organizing committee within a workplace, consider using *Labor Notes' Secrets of a Successful Organizer*.





- ➔ **Recruitment.** Recruit members to the committee who are people-oriented, inquisitive, and good at engaging colleagues in a dialogue.
- ➔ **Timeline.** Plan a timeline that works. If the basic focus is to build strong membership ahead of a bargaining cycle, then leave time to adequately engage members before bargaining priorities are collected from members. If the focus is to identify new leaders, plan well ahead of the next election cycle so emerging leaders can be ready to run well ahead of election filing deadlines.

## **Intermediate Organizing Committee**

If the union possesses a bit of organizing experience and internal capacity to act already, still start by creating the organizing committee with a couple of great trusted and respected members. Once the committee is formed, use a pre-crisis goal such as an issue organizing campaign to develop internal capacity. Here are specific benchmarks to consider:

- ➔ **Purpose.** The committee's charge is to keep building internal capacity beyond other organizing efforts in the past. The charge may be to develop a pre-crisis and timely issue-based campaign or to build the political analysis of the membership. The committee may also begin to engage the **community** or other allies within the school system depending on the organizing issue.<sup>2</sup>
- ➔ **Recruitment.** Recruit members who are natural leaders within the union; respected by their colleagues and who can accurately and effectively convey information to members and the community. Find members with pre-existing relationships with the community.
- ➔ **Leadership.** Given the potential of the committee to morph into a crisis committee to lead a strike in the future, seek to find unflappable members who also can work productively with elected leaders and the bargaining team.
- ➔ **Timeline.** Plan a timeline that allows time for relationship building with the community in order to build long-lasting, sustainable relationships and a joint analysis on the organizing issue. If the effort includes a strike in the future, these relationships will be critical to deepen support and solidarity while on strike. Meaningful relationships are also essential when working with new partners such as community members traditionally marginalized by the public school system — people of color, immigrants, economic disadvantaged, differently abled communities, etc. Additionally, developing a collective political analysis with our own members also takes time.



### **Defined:**

The concept of community will be determined by what type of employer is involved in the campaign. Higher education unions would consider students on campus as the primary community. Pre-K to 12 unions would consider the surrounding communities as the community.

<sup>2</sup> See the Labor Notes' Secrets of a Successful Organizer Trainer Manual. <http://www.nea.org/assets/docs/Education%20Secrets%20Trainers%20Guide%20-%20June%202022.pdf>

Also see Finding a Good Organizing Issue Labor Notes.pdf and Evaluating an Organizing Issue Labor Notes.pdf resources from Labor Notes in the resource section.





## Advanced Organizing Committee

If the union can boast significant organizing experience from past work, build an organizing committee ready to focus on both member and community organizing. Make sure the union possesses elected leaders who represent the diversity of the membership for the most part and are well connected to members' concerns and priorities. The union should also have a strong second tier of leaders. If these leadership elements are not in place, consider using a more basic organizing committee structure and focus to build up leadership and internal capacity. Here are some additional and more advanced benchmarks to consider:

- ➔ **Purpose.** The committee's charge is to expand its external capacity and look to further engage the community and stakeholders beyond the last organizing campaign. The charge may include building a political analysis of the change you wish to see in the school/workplace *with* members and the community jointly. Campaign goals will be bigger, broader and involve more complex strategies to win.
- ➔ **Recruitment and Leadership.** Consider inviting a community member or two to join the organizing committee.

## Regional or Statewide Walk-Out Committees

One of the best ways to demonstrate our power as a union is to speak loudly, with one voice collectively especially when we act on the statewide level. Taking on a walk-out requires significant pre-crisis planning and internal capacity building. Here are specific benchmarks to consider:

- ➔ **Purpose.** The committee's charge is to coordinate and create a plan for a regional or statewide walk-out. We begin early in order to put necessary leadership, logistical, and strategic pieces into place to win.
- ➔ **Recruitment.** Recruit members and/or local leaders who are well respected in their schools and communities, possess a strong analysis of the issues and a willingness to weave a network of support using the local union structure and community allies. It is okay not have participation from every region of the state or local union.



## TIP:

We've seen a lot of statewide actions begin with rank and file members self-organizing a campaign separate from the state affiliate or their local union. Sometimes these efforts involve non-members. Whenever possible, find ways to coordinate with rank-and-file led campaigns early on. This allows a common strategy to be built between the formal union leadership structure and an ability to leverage each party's strengths — rank and file's ability to mobilize and connect members and non-members in organic ways and the union's organizational know-how for campaign building, infrastructure and legislative process. See the Arizona case study.

For statewide actions,<sup>3</sup> recruit regional representatives and a second tier of local union leaders to implement coordinated actions with member and community allies on the community level. Be sure to invite a community member to two to join and try to intentionally recruit early career educators and members of color to the committee.

- ➔ **Decision-making.** Clarify how decisions will be made and how major decisions and messaging will be shared and affirmed (and even tested, if possible) by local unions. Define the authority of the statewide or regional committee and what elements must be approved by the state affiliate. Be mindful to work towards collaborative decisions to empower members, while also being diligent to follow state affiliate policies and procedures.
- ➔ **Engagement.** Use technology and other creative methods to keep committee members, allies and local leaders engaged in the committee's planning. Make sure to prioritize collective planning and constant communication. In most #RedForEd states there were Facebook groups with thousands of members and community partners to plan their statewide collective actions and to engage members throughout the buildup to the walk-outs. Consider also using video conferencing on a weekly basis to check-in on progress to goals leading up to the walk-outs.
- ➔ **Timeline.** Attempt to build the timeline to leave room for thoughtful strategy building and the analysis of member involvement. Rushed planning often leads to burned out local leaders and a loss of momentum.



### **Early Bargaining Support Tips**

For states who do collective bargaining, **ADD** these early bargaining support tips into the scope of the organizing committee.

- ➔ **Purpose.** The committee's charge is to build union power to bolster the bargaining team's position with management and build the capacity to act and develop members' analysis as it relates to the local contract. This could be using early organizing efforts to bolster traditional bargaining issues (adequate funding for salaries and benefits) and/or organizing around untraditional bargaining issues. Consider exploring the concept of bargaining for the common good for more ideas on untraditional issues. The committee should eventually add tactics into its pre-crisis organizing strategy that prepare the membership for a potential strike.
- ➔ **Decision-making.** Define the roles, responsibilities and authority<sup>4</sup> of the organizing committee compared to the bargaining team early on. Make sure to establish a liaison and process for informing each group of key decisions, key tactical plans and dates, and information relevant to overall success. Early and strong coordination lays an important foundation for future collaboration if tactics escalate, especially if a strike is needed later.
- ➔ **Recruitment.** Recruit members to the committee who are even-headed, well respected by their colleagues, good at follow through and building strategies that may push the local union out

<sup>3</sup> See the Statewide Action District Roles and Responsibilities.docx from Arizona Education Association in the resource section.

<sup>4</sup> See the Crisis Roles, Checklists and Tactics Sample Handout VTNEA.pdf from Vermont-NEA and/or the Bargaining Roles and Responsibilities.doc in the resource section.

of its comfort zone. Consider inviting a community member or two to join the organizing committee. Consider adding a subgroup of members within the committee charged with developing a communications strategy and campaign message. Reach out to state affiliate or NEA staff for assistance when developing your campaign message.

- ➔ **Leadership.** The local president should decide early on if they should serve on bargaining team or not. The president should not do both and needs to understand each option creates a different experience and access to decision-making (bargaining/internal versus engaging with the community and members on the outside).
- ➔ **Timeline.** Begin external outreach *before* finalizing bargaining proposals and consider including community members' input within the proposals (again see common good bargaining definition).

You may struggle to find enough leadership to fill out the ideal committee or struggle to canvass the whole membership in-person (See Chapter 3). Getting organizing committees going is hard work and takes time. With the ideal in mind, find ways to work with those who show up toward what is possible. Meet members where they're at and build from there.

## **Internal Systems**

For local unions new to organizing and even for those with some organizing experience, internal operations can be overlooked, outdated, or underdeveloped. Here are a few best practices to put in place before building a crisis campaign and to continue to maintain after any strike or walk-out. Sometimes systems must be built while the crisis campaign is underway but doing so draws down the union's capacity to develop other aspects of the campaign in a deeper and more meaningful way such as community relationships, political education with members, and mentorships of emerging leaders.

## **Develop Your Own Communication System<sup>5</sup>**

You must not rely on the employer's email listservs, human resources records for contact information, or other modes of communication to communicate with our members. It is also ideal to **find 2–3 communication methods**.

- ➔ **Email.** Many local unions maintain their own **email system**, but does it include: 100% non-work emails; all members in every bargaining unit (*especially ESP*); an email list of potential members and/or other non-bargaining unit staff; and an email list of community partners



### **TIP:**

See the Arizona case study for more illustration on why a fast timeline can be exciting but also hard to sustain and build a deeper level of capacity among members. Sometimes vital things can get lost when campaigns move fast, such as deeper member education on the value of the union, emerging leader identification work, and building strong cohesion between staff-local leaders, etc.



### **TIP:**

Consider using images and smart posting strategies to help build an audience and following on whatever platform you choose. This includes creating memes, infographics, polling your followers, and creating events to invite and engage members and the community. See the NEA suite of social media tools, tips and trainings through [learn.nea.org](https://learn.nea.org).

<sup>5</sup> Contact your State Association Communications Dept., and/or the NEA Center for Organizing, for assistance on using the latest communications tools for engaging and organizing members.



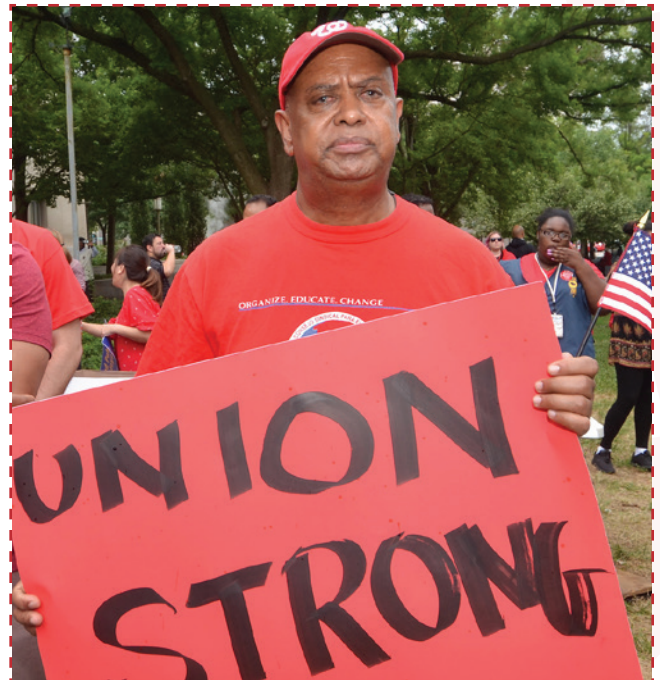
- ➔ **Phones.** Before you send your first text message — remember that there are federal laws that prohibit how we bulk text message people. Contact your attorney, as well as your state affiliate or NEA to learn more about different texting platforms you can use to reach our members and supporters within the law. Texting is a great immediate communication tool for quick updates, reminders and time-sensitive information sharing, but it **does not** replace the face time necessary for developing relationships and trust with members and community allies.
- ➔ **Social Media.** Use social media platforms that make sense to our audience — members/potential-members and community supporters. It is also a great tool for making our own media<sup>6</sup> during various parts of the campaign. NEA offers local leaders and staff a variety of additional social media best practices at: [learn.nea.org](http://learn.nea.org)
- ➔ **Regular Useful Updates.** Engaged unions produce transparent, useful, relevant and frequent communications to members. Updates can be made through printed or electronic newsletters. Most importantly, local leaders should produce *relevant* and *frequent* updates to rank and file members. You should feel comfortable contacting your state affiliate communications department for assistance and best practices.
- ➔ **10 Minute Meetings.** A fundamental way to disseminate information and empower leaders at the worksite level is to develop a 10-minute meeting system. Updates involving the campaign can easily be broken into basic 10-minute meeting agendas. You can break up complex topics related to contract proposals, legislative initiatives, or policy demands into bite-sized pieces within these meetings. Plus, it allows decentralized conversations and a place for local action taking/planning for early tactics such as button wearing, petition circulation, etc. See templates for examples and tips.<sup>7</sup> Short, concise and frequent meetings increase attendance. Be sure your 10-minute meetings make time for two-way communication.
- ➔ **Website/Online Resource.** Creating a landing place for members and allies to reference information can be important for the crisis campaign but it isn't always necessary. Only use a website if your campaign would benefit from a landing page to publicly post resources or documents. Always add a link or directions for someone to learn how to join our union.

## **Local Union Finances**

Building towards a potential strike or walk-out will take financial resources. Work with local leaders to examine local finances and see what reserves exist. If you are planning into the future, consider if a local dues increase may be needed to provide the resources necessary to run a successful campaign. This can be an important test of member commitment. If the issues are not compelling enough that members are willing

<sup>6</sup> See the UTLA and Pueblo case study on pages 118, 120 in case studies section as examples here.

<sup>7</sup> See two sample 10 minute meeting templates (10 Minute Meeting Agenda Crisis Buildup Sample.docx and 10 Minute Meeting Agenda during Bargaining Sample.docx) from Vermont-NEA in the resource section.



to increase dues to wage the fight — then consider whether they would be willing to walk-out. Get creative and consider setting up fundraisers with community allies who share some of the issues our union is fighting to win.

Share any relevant state affiliate organizing and/or crisis (strike) financial policies and resource information early on. Some state affiliates invoke cost-sharing policies between the local and state if a strike becomes part of a campaign. In other states, organizing resources and strike resources do not exist on a state level, requiring more pre-planning and creative fundraising.

### **Member Finances**

If you think a strike may be in the future, prepare members early for potential loss of wages. Every state has different laws regarding salaried and hourly workers and whether an employer can withhold money during a work stoppage. Even if unlawful, employers may still illegally withhold wages during a work stoppage as a retaliatory tactic to end the action, and these illegal withholdings may not be recovered for some time. Members benefit when they think creatively and early about how to minimize economic hardship in the event of a strike.

Economic security is a larger issue for Educational Support Professionals and licensed educators lower on the salary schedule. Remember that addressing this issue early and frequently with members can remove fear-based decision-making that can undermine the urgency of a campaign and overall strategy. Here are some **early planning ideas** to consider:

- ➡ Understand what state affiliate and/or local union resources exist to support the operational expenses of a strike.
- ➡ Encourage members to save money early on. Help them examine their household budgets and consider what can be postponed in terms of expenses if they go on strike and pay is withheld.
- ➡ Create a list of local credit unions and banks. Call that list and ask if the financial institution is open to providing no to low interest loans for educators preparing to take a job action. This action does two things:
  1. It provides another avenue for members to access money to pay their bills if/when a strike takes place
  2. It alerts the local financial community that the threat is real. Often local bank executives immediately call our target(s) like the superintendent and school board members and the media to demand that they take action to settle before a strike takes place.



## Understand the Bargaining Unit

Take time to analyze the composition of the bargaining unit. Understanding the composition of the unit early on allows us time to organize underdeveloped parts of the unit, build membership and ultimately build the power necessary to win.

Understanding the unit is particularly important for ESP units considering going on strike. If a unit is wall-to-wall (includes all possible job categories) or partially wall-to-wall with major job categories included in the unit, this creates different leverage points with the employer. If a unit lacks a critical job category, it will require additional strategizing to find other pressure points to leverage. If an ESP unit includes bus drivers or special education paraeducators, the threat of a strike builds pressure on the administration around transportation challenges and IEP regulation compliance. In rural school districts, this is particularly noteworthy since finding replacement workers for bus drivers as well as some certified positions (i.e. special education staff positions) can be especially challenging for the employer.

Know where the bargaining unit members live. Most educators live in the communities where they work — adding a powerful message of being part of the impacted community. In these cases, you can develop a strong solidarity message around livable wages and affordable health insurance for all to pull in further support within the community.<sup>8</sup>



Finally, understand what other bargaining units exist in the district or university that may be early allies. Build up regular and frequent communication between the groups to build sustained solidarity from the beginning. Communication should go directly to rank and file members and not become bottlenecked at the union leadership level. Moreover, our strategy and tactical planning should include all the bargaining units potentially impacted by the early issue organizing work and possible strike. Identify how the potential strike may impact another union, group of employees and community early on. For example, if a strike occurs, will ESP be allowed to strike alongside teachers? Will ESP lose pay or positions? Will teachers be able to strike with ESP? How will a collective action positively or negatively impact students and our communities? Make time to specifically and intentionally consider the impact to communities of color in your campaigns and understand where implicit bias can impact what allies we automatically engage and what allies are invisible to us given our bias.

<sup>8</sup> See the Brandon, Vermont and Port Angeles, Washington case studies on pages 122, 116 in case studies section.





## Union Cohesion

- ➔ Building a working and productive relationship between union staff and leaders involved in the crisis campaign is vitally important. State staffing varies with some states having regional or statewide organizers specifically tasked with supporting member campaigns. Others rely solely on UniServ Directors to support all activities within a local union. In addition, most states employ at least one communications person (or department), a lawyer, and administrative support staff. Local elected leaders should<sup>9</sup> establish the vision, where they want to go and what they want to win. Local staff should work together to figure out how to get there.

In any scenario consider these questions and check-in with staff working on a campaign throughout the effort:

- ✓ *What are the roles and responsibilities for each staff member within the campaign? Ensuring clear roles and responsibilities/expectations is critical to a good plan.*
- ✓ *What roles and responsibilities will governance have within the campaign? How do we make sure everyone knows what everyone else is doing, trust each other to make sound decisions and complete the work needed to reach our goal?*
- ✓ *How will staff make decisions regarding how to achieve the vision set forth by local governance? What collective advice will staff provide to the local or statewide organizing/crisis committee? What happens if there is disagreement between staff members?*
- ✓ *How will staff members communicate with each other and governance to keep each other apprised of various developments?*
- ✓ *During a compression moment like a strike, how will communication and decision-making work under pressure and during time sensitive periods?*
- ✓ *How will the core staff work as a team with other specialist staff such as communications, legal and administrative people? What about the roles of local, state/regional, and national staff?*
- ✓ *How and who is responsible for including state level governance within strategy and tactical discussions? What authority does governance have over local strategy decisions? What about statewide strike campaigns?*
- ✓ *Define the level of authority that local leaders, state staff, state governance and state management have in a crisis campaign/strike.*

<sup>9</sup> See NEA Hierarchy of Choices for Campaign Planning.pdf and the Governance and Staff Roles and Responsibilities JCEA.pdf in the resource section.

Unnecessary stress and conflict can develop in the middle of a challenging moment in the campaign if local leaders and staff do not take time in advance to develop cohesion, define roles and discuss how to make decisions.

Establish working group norms together. In Colorado during the Pueblo strike, staff and members created the following list of working agreements:

- ✓ **Clear, Concise Roles & Expectations for Everyone**
- ✓ **Keep It Short & Sweet (KISS) When Communicating with Each Other**
- ✓ **No Cannibals — We Don't Eat Our Own, We Support One Another**
- ✓ **Take Care of Each Other** — *A crisis build up and potential strike is an incredibly stressful time, and everyone deals with stress differently. Get to know the team and think through ways to support each other in a solution-oriented way.*
- ✓ **Constant Communication** — *Establish how the team will stay in constant communication and make sure to let everyone know what to expect.*
- ✓ **The 24-Hour Rule** — *If something doesn't feel right after an interaction with another staff member or leader, you have 24 hours to either address the issue or let it go.*
- ✓ **Assume Positive Intent & Give Each Other the Benefit of the Doubt**

Arizona Education Association (AEA) learned the value of bringing in staff and member leaders into early discussion to establish how to make decisions and to work as a team, as well as how to include non-members who played a large role in their 2018 #RedforEd walk-out campaign.

Similarly, developing clear roles for any outside assistance from NEA or shared-staff assignments from other states is critical to define early on so everyone understands their role and no one is underutilized or unilaterally assumes too much authority over parts of a campaign.

## Member Engagement and Developing an Analysis

A large part of capacity building must include engaging rank and file members, working with them to identify priority issues involved in the bargaining and/or crisis build-up, and then developing their political analysis to understand *why* their involvement is needed. During the life of a crisis campaign, members should be able to articulate why they are taking action and what they hope to achieve well before they are on strike. Members' confidence and effectiveness engaging hesitant colleagues and recruit members of the public to join the campaign grows when they understand what is at stake. Engaged members also initiate ideas and take actions more readily when they deepen their analysis and feel ownership of the campaign. With an intentional approach to engaging members, our union can move away from short-term mobilization efforts that develop little to no power and instead harness our collective power to develop long-term and major wins for our schools and community.

Member engagement also means engaging and recruiting potential members to join the union. Despite the Janus decision, many states are experiencing membership growth. When educators understand what we are fighting for and why, they are more likely to find relevance, inspiration, and an internal drive to act. If members appear passive and apathetic, explore the *Labor Notes Secrets of a Successful Organizer* or *How to Jump-Start Your Union* resources to help incorporate beating back apathy strategies with members.<sup>10</sup>

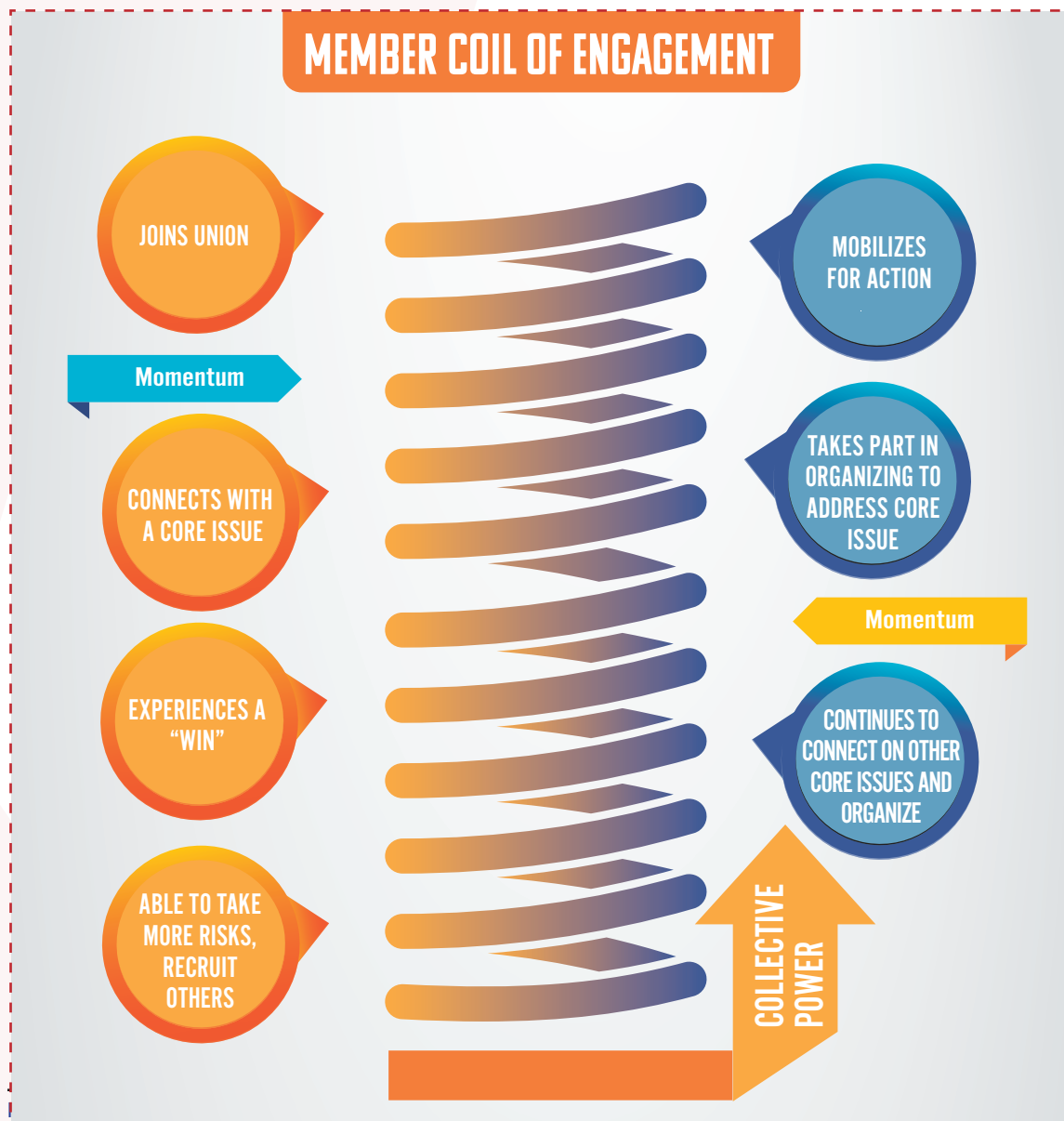
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<sup>10</sup> Use Labor Notes' Secrets to a Successful Organizer Trainer Guide, especially the beating apathy section. Also the book by Labor Notes, *How to Jump Start Your Union*. <https://labornotes.org/store/books>

## Ladder of Engagement

When we fail to meet members where they are and give them opportunities to plug into our work, members can view the union as a transactional, service-only organization. Some members may become local leaders, attend meetings and stay abreast of current issues, but large number of members rely on leaders and state staff to run the daily operations of the union. Most members only experience union activism occasionally for a mobilizing related action — attending a critical meeting and/or maybe going to the State Capitol to lobby. Mobilizing begins to activate members, but to truly engage members in a sustained way beyond one campaign, we must listen to their priorities, reflect their priorities within the union’s work, and provide ample opportunities for them to engage in our work. The more we wind members through engaging them on their issues, the more energy potential builds up resulting in more powerful unions and stronger abilities to act.

So how do we begin this process and go beyond passive communication efforts with members?





## Know Our Membership (Blitzes, One-on-Ones)

How much do we know about our members beyond demographic information (e.g. grade level, department, job title, member vs. non-member)? If the answer is not much, consider organizing a **basic information-gathering blitz**. If we know a fair amount but do not know the current concerns or priorities, consider doing an **issue-based blitz** and ask about members' specific issues and priorities.<sup>11</sup>

Once we know what issues our members care about, we can use an **inoculation/empowerment-based blitz** to engage members in small group conversations to deepen their knowledge of power dynamics involved in strained labor-relations with the employer and/or with the legislature. You will need ample time to conduct deeper conversations, answer questions, address fears and get to the **WHY** of the crisis campaign. These conversations also include discussing larger systems at play that may involve special political interests, explanations of why certain elected leaders or managers are the focus of a campaign (e.g. school board chair, university president), and mapping power dynamics so members understand what lies behind the employer rhetoric. Craft messages to help members understand what is at stake. Investing time in this last type of blitz builds members' confidence to engage in labor action.



### Defined:

A blitz is a short-term campaign to reach as many people as possible in a short period of time to complete a project quickly either due to urgency or to create excitement and momentum within a campaign. It can be used internally with members or externally in the community and can involve one-on-one conversations, concentrated information sharing or an action-oriented ask.

## SAMPLE OF INTERNAL UNION BLITZ STEPS

1

Start with one-on-one conversations with existed elected leaders using a short list of the same open-ended questions with each person.



2

Expand out to include all members. Conduct one-on-one conversations with the same questions. If bargaining, ask members to articulate traditional and untraditional ideas to propose in bargaining. Do this in person.



3

Include non-members and incorporate a membership "ask" at the end to invite them into the union.



4

As you collect information note patterns in issues raised and use those to inform union priorities for potential organizing campaigns and bargaining proposals.



5

Always be on the look out for emerging leaders and ask who are the natural leaders at the worksite.



6

Loop back to members and share what was learned.



<sup>11</sup> See several blitz planning templates from Colorado and Vermont (Membership Blitz Organizing Packet.docx), ranging from sample scripts to planning checklists in the resource section.

## Choosing the Issue and Setting Priorities

How are union priorities set now, especially for bargaining proposals or statewide legislative agendas? It's important that priorities come from the rank and file. Work with local leaders to create criteria for decision-making and a transparent way to consistently communicate with members along the way. Here is an example decision card from Colorado:

Try thinking about new ways to engage more members early in the process, especially before bargaining proposals or legislative agendas are set.

### DECISION CARD

#### FRONT:

When making a decision that affects our member and staff at CEA, please consider what your desired outcome is and the following questions:

##### CONSIDER:

- Will this build power for the organization?
- Will this make a difference in our members' lives with the next year? 5 years? 10 years?
- Will this make a difference our students' lives
- Does this benefit and empower people of color (POC) and folks from historically marginalized communities?

#### BACK:

You have an opportunity to make or influence a decision that results in a positive outcome for our members and staff.

##### HAVE YOU:

- Assessed the Impact? What are the impacts of this decision that may be unintentionally reinforcing bias, barriers, or inequities? What about this decision makes it easier for staff and members to participate?
- Generated Options? What are some alternative action options that could produce different outcomes?



**Basic** Once issues and individual priorities are gathered from the membership, consider appointing a group of members and elected leaders (or a bargaining or organizing team) to read through responses and set criteria for what should be included. Criteria could include issues mentioned the most, issues that address equity for lowest-paid members or those with less rights/benefits or low-hanging fruit issues that begin to improve the workplace and/or school community beyond wages/benefits. Consider using the *Checklist for Choosing an Issue* or *Finding a Good Organizing Issue* tools in the template section to further assess issues. Also consider using *Labor Notes' Secrets of a Successful Organizer*<sup>12</sup> to explore a more detailed method on how to break down issues and find the right ones to build a campaign.

Select immediate priorities and create a timeline for addressing second and third tier priorities. For example, we may need to start creating bargaining proposals, but after discussing one of the issues in the proposal it became clear that the issue identified wasn't widely or deeply felt. Instead, the priority issue was school specific like a bad manager which might require a different campaign effort. Always ask, "is this issue deeply felt? Is it widely felt?" If the answer is yes, then find ways to incorporate the issues into bargaining proposals or other issue-based campaigns.

**Moderate** Building off the basic approach, bring the final list of priorities back to members at a membership meeting and 10-minute meetings to communicate the results and seek approval. Members could amend the priorities if there is majority support to do so.

**Advanced** Consider including external stakeholders such as parents and community allies to get their input. Incorporate any additional information into the priorities and then bring a final version back to members to debate and adopt as a group.

In Colorado, members use a bargaining for the common good practice by doing an annual listening tour blitz to identify issues. Then local leaders work with staff to create a platform and a plan to address the

top issues that are deeply and widely felt by members, students, and the community. Once the platform is drafted, members host town halls or forums, invite students and community to attend and provide feedback on the platform. Students and parents do not have collective bargaining agreements with the school district, but we do. We have both an opportunity and a responsibility to use that power to advocate for the common good. When we bargain for the things that matter to our students and our communities — and we include them all as stakeholders in the process — we win.

Approaching priority setting in this way creates for a more **inclusive process**, expands members' **knowledge and investment** in union operations, and **widens perspectives** in decision-making. Also reviewing priorities and taking time to ask members to provide initial ideas and then feedback on the results allows our union to identify short-term and long-term goals. We must view our organizing work as an ongoing, sustained effort that involves campaigns building upon each other over an extended time.



## TIP:

This is another opportunity to consider using common good bargaining and/or laying groundwork for this during future campaigns. This could also reveal a larger, long term campaign involving more organizations than one local association such as state-wide policy debates for education funding for pre-K to 12 and higher ed, unfunded mandates, etc. See the Bargaining for Common Good Bargaining Proposal Examples in the resource section to get inspired on what is possible.

<sup>12</sup> <http://www.nea.org/assets/docs/Education%20Secrets%20Trainers%20Guide%20-%20June%202022.pdf>



## Membership Growth

How large is our membership? The density of the membership (number of members as a percent of eligible employees) cannot be ignored as we begin a crisis campaign. Traditionally union meetings, communication and outreach involve members-only. In a post-Janus world, we must view non-members as allies and potential members and understand that every non-member is not the same. People do not join the union for a variety of reasons. When embarking on the beginning stages of an issue organizing or crisis campaign, reach out to non-members and ask them to join the union as part of the campaign. We should always look for ways to recruit and invite new members into the union. Many non-members say that the reason they haven't joined is because no one asked them to join.

Think carefully about the frame you use. Staff in Ohio now consciously talk about “*inviting*” non-members to “*belong*” to the union; rather than “recruiting” them to “join.” Language matters.

Also, know our audience and tailor the membership ask. Remember to meet potential members where they are and provide ample opportunities for them to engage in our work. We are finding new members join the union and stay members when:

- ✓ the union is relevant to their lives.
- ✓ they are invited to take ownership of it.
- ✓ there is opportunity for professional and personal leadership development.
- ✓ the union's values align with their values.
- ✓ the union is part of a movement fighting for fairness, equity, social justice and a stronger public education system that puts students, educators and the community first.
- ✓ they and the union fight for the issues that matter most to them.

Check out the [NEA Early Enrollment Campaign Action Guide](#) for more logistical tips on building a vibrant membership drive. Many elements within this Guide are relevant regardless of what time of the year you ask a potential member to join, but the NEA Early Enrollment Campaign (often in the spring) offers added incentives to new members upon joining.





## Early Community Outreach

Community allies often asked to support a campaign only at the point where unions need solidarity to put extra pressure on decision makers before they go on strike. Waiting to reach out to community members only when an acute need arises before a crisis, creates a short-term relationship and little collective power building. Taking time to develop relationships before a crisis can amplify educators' demands, expand what you can win, and build more vibrant community-based campaigns that ultimately benefits all students. In a pre-crisis campaign, make sure to include outreach strategies early-on that build and deepen community relationships and discover ways in which the union can show up for the community allies when they ask for our support.

### Getting Started — Map Our Community

Early on begin by simply **mapping out our community**. For teachers and support staff the community is the school community and towns served by our schools. For higher education faculty and staff, this will be the campus community and perhaps the town or city where the university is located. Identify existing relationships between members and individual community members and organizations.<sup>13</sup>

Social justice organizations map communities frequently to identify allies, influential and “targets” (focal points of campaigns). See the resource section for details of each planning tool mentioned below.

- **Community Network Mapping Activity or Who Do You Know?** A tool to use in 10-minute meetings, small group meetings or other settings to crowd source ideas on key community members to contact, including a notation of people identified with a connection to the member.
- **Cornerstone Tool.** A planning tool for defining our campaign targets, “audience” and “constituency” to specifically articulate who among the community members and can effectively influence the targets.

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<sup>13</sup> See the Member Community Power Mapping Activity.docx in the resource section.



- ➔ **Community Organization Mapping Tool.** A tool specific for mapping organizations in the area based on types of categories. Another great tool to use with small groups or the organizing committee.
- ➔ **Student Body Information.** A tool used to map the college or university student body to identify potential allies and critical student organizations.

Once we map the community, reach out to individuals and organizations through member-established relationships. The United Teachers of Los Angeles<sup>14</sup> organized a series of parent-outreach trainings for their chapter leaders (building representatives) to assist them in bolstering members' confidence in contacting parents. They used several tactics with parents such as leafleting, visiting parents in their neighborhoods with translators where applicable, and securing parent commitments with petitions. UTLA also used members' preexisting connections with authentic grassroots community organizations to organize a coalition, which developed a parent liaison system at many schools.

Members have legal rights to engage with parents and community members outside of work hours about matters of public concern. Be sure to check with your state affiliate legal counsel and local policies to ensure that all outreach activities are legally protected.

## **Build Relationships and Listen to the Community**

Relationships must be two-way. This outreach effort is as much an effort by the union to learn the community's priorities for the public schools and/or university as it is to educate the community on the union's issues. When we begin early enough, we can incorporate the community's concerns into our priorities, which allows campaigns to blossom into true community campaigns.

Take time to build lists of potential ally organizations and individuals from crowd-sourcing ideas from the membership and collecting information in the community. You can also build pro-education and pro-labor lists by systematically collecting names at community events with sign-up sheets or through social media strategies. These lists can be used for phone banks, letters to the community and other types of outreach to educate and activate allies.

In Los Angeles, a common chant on the streets during the 2019 strike was *"Who's Strike? Our Strike?"* incorporating not only striking teachers but their community allies. UTLA fought for larger community issues such as ending random student searches, protecting undocumented students from ICE raids on school campuses, and pushing back on over-testing.

In the Ferris University faculty strike (Michigan), the local union created and continues to maintain a good lasting relationship with the student newspaper. This allows them to maintain continuity through an established student organization on campus year-to-year. Students pass on knowledge and the relationships with the faculty union to new students. Michigan Education Association (MEA) also uses the MEA Aspiring Educators organization to develop consistent relationships on campuses through these aspiring teachers and union members. This allows them to maintain continuity through an established student organization on campus year-to-year. Students pass on knowledge and the relationships with the faculty union to new students.

After our crisis campaign or strike is over, make sure to continue to tend the relationships with the community and understand how our union can show up for the efforts of parents, community organizations and other labor unions. Union relationships with students must also be fostered continually, given the cyclical nature of students on campus.

<sup>14</sup> See the [https://www.utla.net/sites/default/files/reclaimourschools\\_case\\_study.pdf](https://www.utla.net/sites/default/files/reclaimourschools_case_study.pdf) for more details.



## Campaign Planning

Understanding the lay of the land and the power dynamics at play can help focus goal setting and strategy-building for an early issue organizing campaign leading into a strike build up.



### TIP:

Opponents will often be some part of the management of the school district or university. It is important to specifically define the target rather than generically say the “school board” or the “board of trustees” because within these entities are bigger influencers who hold the most power and interest in winning the opposition’s goals vs. others and we must know who they are to understand their motives and vulnerabilities. There can be other opponents who are not the main targets of a campaign, including special interest groups such as corporations related to charter schools or anti-union establishments.

## Power Mapping (Targets and Allies)

It is helpful to begin first with some sort of **power mapping** effort. Power mapping means documenting important individuals and organizations involved in the issue we care about and defining their level of decision-making authority, influence, and whether they are allies or opponents to our cause. We power map to help us assess what is winnable and what is beyond our reach. We also power map to help us know where we are when a campaign begins and to measure how our power and influence changes throughout the campaign. Finally, power mapping allows us to see our existing power — our network and our potential network. It is almost always bigger and more powerful than we think, but to activate it we must know what relationships we need to cultivate and where we should focus our collective efforts.

We also need to be honest about the current level of our union’s power. If a local union or state affiliate has not engaged members and built internal capacity, a crisis campaign may be limited in what it can achieve. However, it is important to always look forward to our potential and inspire members to organize and build power one step at a time. Never underestimate the power of members. Power comes from sustained, consistent involvement and knowledge. See the resource section for more details on the tools listed below.

- ➔ **Power Mapping.** Conduct an assessment of the players and the dynamics at play early on with the organizing committee and/or elected local leaders. This assessment allows everyone in the campaign to begin understanding the lay of the land. Since things change, this assessment should be repeated throughout the campaign: *Who are our allies (general categories)? Who benefits from a win or a loss on this issue? Who are our opponents? Who are the decision makers (a.k.a. targets of the campaign) that can make the change we seek? Who are the influencers that can impact decision makers’ minds?*

- ➔ **Power Mapping Tool with Finance Element.** This worksheet is similar to the tool above but includes a breakout of types of influencers — personal, public, and financial. For larger campaigns and/or larger profile players such as statewide targets or larger districts, the financial analysis can be very helpful in defining the target and developing a strong political analysis on the motivations of the opposition.



### TIP:

As within internal issue assessment and capacity building work, data collection and management is critical when mapping the community and collecting information on potential allies and opponents. Some data collection programs used for internal use can also capture external data such as community organizations and community individuals. VAN and NEA 360 have both tracking capability. VAN additionally has the capacity to create lists of likely community supporters through the My Voter tab. Consult with your state affiliate’s data team for the latest and best suited tools.

- ➔ **Power Mapping Guide (circles).** A resource to help broaden thinking of how far and wide individual's networks can go.
- ➔ **Power and Interest Mapping Tool and CEA Community Power Map Template.** A resource to plot those with power (both allies and opponents) and their level of interest in the issue. This tool can help prioritize allies (influencers) and opponents when there may be multiple players involved and/or the campaign is complex.
- ➔ **Background Research on Employer.<sup>15</sup>** Build a background information file on each school board member, superintendent, district bargainer and other key district figures. Include address, home and business phones, place of employment, political leanings, clubs and organizations, past jobs, length of current service, major money interests and any other useful information. Include research on the district's financial status. How big is the budget? How much do they spend on legal support for labor relations, i.e. bargaining against the union? What is the enrollment pattern? This information is useful for preparing financial bargaining proposals, but it is also useful for creating a narrative with the community on funding priorities.
- ➔ **SWOT Analysis.** Analyzing our strengths, weaknesses, opportunities, and threats (SWOT) helps to provide a clear lay of the land. Gather a group of members. Don't forget to invite the organizing committee and local leaders and some community allies that you can trust to meet for 2 to 3 hours to have an open and honest discussion about our union's SWOT.

## Goal Setting

A goal should be an aspirational statement that inspires the organizing committee, local leaders, and membership to keep organizing and taking action throughout the life of the campaign. Local unions can have large goals and short-term goals. It is important to distinguish what the campaign's goal will be for the crisis campaign ahead. This will tend to be a short-term goal that will build towards the larger goal.

Often organizing committees confuse objectives for goals and/or get lost in planning tactics. Setting objectives and tactics are easy compared to establishing and testing our goal to make sure it fits. A strike is never the goal. Strikes or labor actions are tactics and one moment within a campaign. A goal may require several bargaining cycles or a bargaining strategy and a community or political outreach strategy to ultimately achieve success.

Consider using these prompt questions to determine the goal:

- ✓ *What are you trying to achieve? What is the change you wish to see in our school/university, community or state?*
- ✓ *Does it inspire us to act? Does this goal allow many paths (strategies) towards winning?*
- ✓ *Will we win our goal through bargaining, an election, or policy/law passed by elected officials? For example, can we bargain a solution?*
- ✓ *Can we advocate with our employer for a solution? Can we encourage the community to help advocate for the solution? OR does the goal only lend itself to one strategy? If so, it may not be aspirational and broad enough.*
- ✓ *Are we incorporating student-centric thinking and community input in our goal setting? If so, will it inspire our allies and larger community?*

<sup>15</sup> See the Employer and Board Assessment Tool.docx in the resource section.

Setting a goal around educator compensation does not conflict with advancing student success and a strong education system. Our opponents love to guilt educators into believing more compensation or decent health insurance for educators undermines the school or university's ability to do more for students. That is a false logic. When we all do better, our schools and communities thrive. All students deserve access to a high-quality education, and that includes recruiting and retaining the best teachers, ESPs, and higher education faculty, which means our schools need to provide good jobs with good pay and benefits. Explore how to meld educator needs with community needs. They are intertwined.

For larger goals we may articulate them as the larger umbrella of the local union's work for the next 3-5 years. Several campaigns may be involved to reach that larger goal. Those type of goals may be more equitable schools for students or a fairly funded school system from pre-K to higher education. For the sake of this resource, we will focus on how to establish the campaign goals (usually short-term goals).

To determine the effectiveness of the campaign goal consider using the simple **S.M.A.R.T.I.E. planning tool** with the organizing committee. Is the goal **S**trategic, **M**easurable, **A**ttainable, **R**ealistic, **T**angible, **I**nclusive, and **E**quitable? Then test the goal with members to see if it inspires members. Will someone be inspired to step out of their comfort zone to support that cause as described in the goal.

**Goal:** To fight for a 2% increase in teacher salaries across the salary schedule.

**Goal:** To fight for equitable pay and professional compensation for all educators.

The simple example above shows a distinct difference. The first goal is more of an objective towards achieving professional and equitable pay for teachers. It is clear but also technical and lacks inspiration. The second goal uses values-based terms such as equitable and professional. It broadens the umbrella to fight for more objectives such as fair treatment with professional development funds, expanding the compensation fight to all educators' pay, not just teachers, and allows many paths (strategies) forward that may go beyond bargaining. Remember, there are many ways to victory. Our hope is to define goals that allow many strategies to get us to the win.

Outline the *opponent's* potential goal(s), to inform strategies, tactics and message. This may involve researching past school or university board meeting minutes and legislative sessions.

The best local leaders and staff work to empower members to lead and drive our work. The most compelling and memorable stories come from those who are directly impacted. For staff, our job is to identify and train members to lead these campaigns, both publicly and in our union halls. Remember, members understand their communities and issues best when they are engaged in developing the campaign priorities.





## **Building Strategy, Objectives and Tactical Planning**

A **strategy** is a plan to achieve a goal. **Objectives** are steps in that journey, and **tactics** are actions necessary to move forward. Strategies can include one or many different paths forward depending on the size and scale of our campaign.

For example, in a large contract campaign like Los Angeles, a basic overview of their crisis campaign plan looked as follows:



### **TIP:**

There are many strategy building tools out there. This manual references the GOST model. The Midwest Academy offers a more complex planning tool. Also consider using Theory of Change for more in depth goal setting. And the NEA offers a comprehensive planning tool for the Ed Summer Program that includes a SWOT analysis, ally mapping and more. See the NEA tool in the resource section.

| <b>UNITED TEACHERS OF LOS ANGELES CAMPAIGN<sup>16</sup></b> |                                                                                                                                                                                                                                                                                                            |
|-------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>GOAL</b>                                                 | Create great public schools Los Angeles students deserve.                                                                                                                                                                                                                                                  |
| <b>STRATEGIES</b>                                           | 1) Push for community schools <sup>17</sup> to transform neighborhoods and create quality local schools,<br>2) Increase per pupil spending within the district,<br>3) Fight privatization to expose billionaires attempting to divert public resources to private schools.                                 |
| <b>OBJECTIVES</b>                                           | 1) Build community coalition with organizations within each of the three strategy areas,<br>2) Push for equitable funding by the district compared to other districts,<br>3) Cap the number of new charter schools approved within the district (and many more)                                            |
| <b>TACTICS</b>                                              | 1) Bargain objectives such as the charter school cap into the local contract,<br>2) Organize large scaled protests before a strike to show the union and community's solidarity,<br>3) Incorporate art on a large scale to illustrate the face of the campaign,<br>4) Strike<br>5) (and many more)         |
| <b>TIMELINE</b>                                             | Their overall goal is one they've been working towards for five years. They began with internal capacity building and community outreach. The strategies and objectives noted above began to develop two to three years before their strike, and the tactics reflect the last 6 months of organizing work. |

<sup>16</sup> See *Building the Power to Reclaim Our Schools*, a case study of the campaign published by Reclaim Our Schools LA. [https://www.utla.net/sites/default/files/reclaimourschools\\_case\\_study.pdf](https://www.utla.net/sites/default/files/reclaimourschools_case_study.pdf)

<sup>17</sup> DEFINITION: A community school is a public school that brings together academics, health and social services, youth and community development and community engagement under one roof, leading to improved learning, stronger families, and healthier communities. (Source: NEA Center for Great Public Schools)

The strategy, objectives and tactics will look different than in a neighboring local union or state depending on internal capacity, community, and state bargaining laws. It will also vary based on the size of the local union, bargaining unit composition, and rural vs. urban nature of the area.



**TIP:** Art Build is collaborative art creation for protests and public events. UTLA, Oakland and other NEA local unions are increasingly using this tactic to help build community and strengthen the visual messaging within campaigns. The NEA has further resources if you are interested in exploring Art Build within your campaign

Tactical planning should be fun and move the campaign forward towards the desired goal(s). Good tactical planning includes an escalation strategy that starts with small, decentralized actions and builds in size, frequency, centralized location and intensity in terms of pressure those actions put on the target. Be careful not to escalate a campaign too quickly or move too slowly and lose momentum. Tactics should be informed by what our membership and community are ready to do while also continually pushing people to step outside of their comfort zone in order to build more union power and pressure on the targets. If we only planned tactics that stayed in people's "comfort zones," we would never reach the full potential of people's power to make change.

Conversely, we can also not get too far ahead of people because we risk disengagement and an unplanned de-escalation in the

campaign when we need our power most — during job actions such as strikes and walk-outs. Tactics should be fun, accessible and community oriented. These principles encourage members to get more involved and build up their confidence and analysis of the campaign. If members are fearful, consider starting with a "less is more" approach and repeat actions for a period of time to increase participation and clarity on the purpose of the campaign. Escalating tactics are also an essential way to test the temperature of the membership and community to see if the crisis campaign issues resonate.

As you plan the tactics,<sup>18</sup> plot the activities along a timeline so you can connect one tactic to the next in an order that makes sense for building up engagement but also pressure on the target. For example, starting a coordinated t-shirt wearing day in the workplace is a relatively easy tactic to build internal unity and launch a crisis campaign versus attempting to pack a school board meeting with hundreds of people as the very first tactic. Tactics should always have a purpose and known audience. *Is it meant to be informative to members? Inspirational? Embarrass or expose the target? Build solidarity? Raise public consciousness?* Lastly, note natural pressure points in the calendar and leverage those dates. For example, the first day of school, summer professional development days, school board meetings, board of trustee meetings, visiting student days (higher education), critical bargaining dates, etc. Align the tactical timeline with the communications and community outreach plans.



**TIP:** Consider organizing sign-making parties, using art build (see above for definition), moving tactic preparation activities around the school district or to different work locations to make it easier for different people to get involved. Also keep the tactics inexpensive and creative. We can preprint signs, for example, but personalized signs create personal ownership and creativity among members and the community. See Chapter 2 for more on tactical planning.

<sup>18</sup> See the Tactical Planning Worksheet.docx, Crisis Roles, Checklists and Tactics Sample Handout.pdf from Vermont-NEA planning documents designed to use with members in the resource section.



Be ready to modify the approach as things evolve and change. The initial plan will likely need to change depending on the employer's actions, the success or lack thereof of certain tactics such as large-scale mobilization efforts designed to apply pressure to decision makers, extended strikes, or several other factors.

While it is impossible to predict when and how we will need to adjust strategies — be prepared to be flexible. No one wants to face an open-ended strike or legislative battle without the flexibility to regroup and maintain some level of a win. Every good plan has many opportunities for debriefing what's working well and what needs to change tomorrow in order to win. Be ready to adapt and create campaigns with an end date.

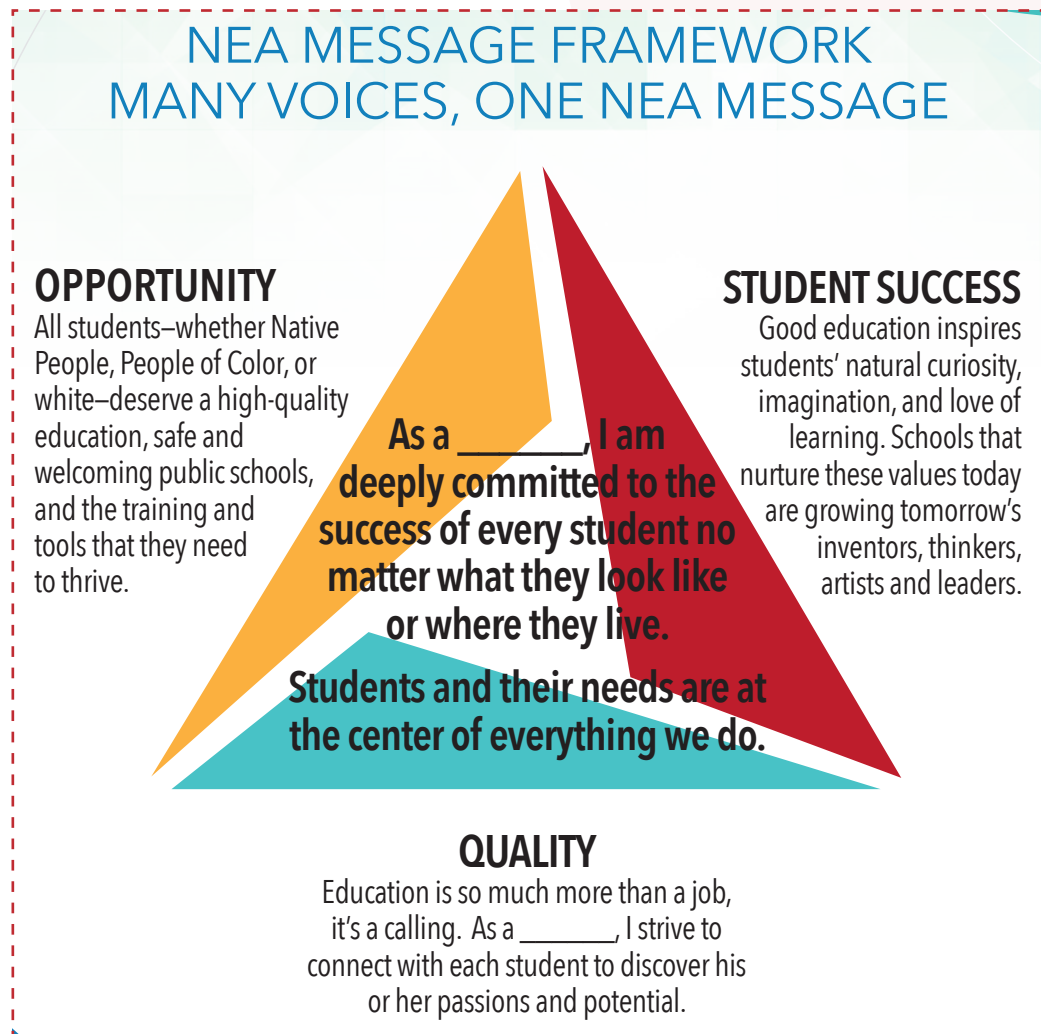




## Clear Demands and a Student-Focused Message

Messages are not slogans or catchy phrases or a canned script. The message must define the core values, problem and the solution. It should reflect our values and priorities, make a point that is true and believable, and resonate with the target audience.

Research shows that target audiences are most receptive to our solutions when we frame them using three concepts: opportunity, student success, and quality (see Message Frame triangle image below).



The NEA's poll-tested message frame is built around the values shared between educators (members), the communities they serve, and the larger public. Locals can use it to address any issue in public education and organize how members speak about specific issues in a campaign.

**The story in a crisis campaign is about educators taking action to remedy the issues and conditions that are having a negative impact on our students and communities.** Our students should be at the center of everything we do. Therefore, make sure to explain how the union's agenda will benefit students. A student-focused message is a winning message.

Use NEA's student-focused message frame to develop a campaign message and clear set of demands. An effective message explains how the problem(s) and solution(s) will impact students. Both internal and external messages should be student-focused and drive your target audiences to take action to help the cause. Internal messages should tap into the passion members and educators feel toward their students since external audiences — parents, voters, and community leaders — care to the extent that it impacts students.

## How to frame the conversation

### Define the Core Value of Public Schools

- 1. Lead with the personal:** Inspiring children's natural curiosity, imagination, and desire to learn.
- 2. Then the societal:** Education is critical to ensuring opportunity, maintaining democracy, and essential to competing in the 21st century.
- 3. Then the role of educators:** Educators connect with each child, discover his passions, and unlock her potential.

### Define the Problem

- Promoting a love of learning is more important than a test score.
- There is too much focus on standardized tests, which take up students' valuable time for learning.
- Large classes allow students to slip through the cracks and drop out or graduate unprepared.
- Schools in poorer communities lack funding and resources needed to teach our children well—success should not depend on where you live.

### Define the Solution

- All our students deserve:*
- Funding that allows educators to connect one-on-one with students.
  - Well-resourced schools, educators, and community support services like nutrition and health care for students who need them most.
  - Classrooms that emphasize curiosity and one-on-one instruction, rather than testing, to inspire students' lifelong love of learning.
  - Curriculum and standards that encourage critical thinking and creativity.

Language matters. Avoid oversimplifying complex topics. Use simple terms and give your message a sense of urgency. Avoid jargon and acronyms that only education insiders understand and can alienate our audiences. Don't use war metaphors, such as, classroom teachers being on the "front lines." We are not at war with students. Consider some of these language variations when developing our message.

| NOTES ON LANGUAGE                                                                       |                                                                                                            |
|-----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| Replace These ...                                                                       | With These ...                                                                                             |
| Education Reform                                                                        | Education Improvement/<br>Education Excellence                                                             |
| Choice/Education Savings<br>Accounts/Tuition Tax<br>Credits/Opportunity<br>Scholarships | Vouchers                                                                                                   |
| Failing/struggling schools                                                              | Students deserve well-<br>resourced public schools                                                         |
| High-stakes testing                                                                     | Too much testing takes time<br>away from learning                                                          |
| Educational equity<br>( <i>a principle</i> )                                            | Every child deserves<br>a great education<br>( <i>an outcome</i> )                                         |
| Funding formula ( <i>a process</i> )                                                    | A budget that means class<br>sizes are small enough for<br>one-on-one interaction<br>( <i>an outcome</i> ) |
| Inequality ( <i>vague</i> )                                                             | Living in the right neighbor-<br>hood shouldn't determine a<br>child's future                              |
| Wrap-around services                                                                    | Support services such as<br>health care and nutritious<br>meal programs                                    |
| Foundation for student<br>learning/Basic skills and<br>information                      | Inspiring natural curiosity,<br>imagination, desire to learn                                               |
| Accountability                                                                          | Let's get serious about doing<br>what works/providing the<br>resources for student success                 |



When using the NEA message frame to develop a message, let members help draft the talking points and identify the stories needed to support your message. The more ownership members have in developing the message, the more consistent they will be in delivering it. State affiliate staff should help advise, train, and support members in developing the message.

When your message is drafted, test it with members and allies to see how it lands. Is it clear? Does it advance a clear story and why these issues are urgent, in terms of how they impact, and necessary to address?

Each local union should determine who the spokespeople should be. Staff should never be the voice or face of the campaign. We always want those directly impacted to be our spokespeople. In some cases, unions will opt for one or two spokespeople. In other cases, for more evolved campaigns, more members should be trained and asked to speak to the media to broaden the face of the campaign.

Also, educators are among the most trusted messengers in their communities. When you speak to the public or the media, stress what you do in our public schools. For example, “As a classroom teacher, with more than 15 years of experience, I know that students learn best when they receive the one-on-one attention they deserve.”

## **Meet Local Media**

Don't wait until you're in crisis mode to develop a relationship with your local education reporters or those assigned to the education beat. Developing a relationship with these reporters before you need them will serve you well when it's time to get some publicity for your campaign. You want them to see you as a resource of information. During the campaign, take time to explain your issues and concerns to them, offer to introduce them to members who are directly impacted, and begin to educate reporters on the crisis campaign.

Seek out media training from NEA or state affiliate communications staff for local leaders and anyone planning to address the media. Practice telling our story and talking about the campaign from our message frame. As the campaign develops, there will be opportunities to use earned media and develop our own media.



## Early Bargaining Strategy

Here are additional strategic points to consider for crisis campaigns involving bargaining.<sup>19</sup>

- ➔ **Ground Rules with Management.** Set ground rules in a way that allows leaders to discuss issues with members and the community. Do not agree to gag orders.
- ➔ **Ground Rules with Union Bargaining Team.** Set ground rules among the bargaining team members and staff assisting in bargaining. Include how you will make decisions, who will create communications and/or speak on behalf of the bargaining team to the membership/public/media, how you will resolve conflict, and how to handle social media especially if things head towards a bargaining crisis. Review the importance of avoiding individual-based bargaining at the expense of the larger collective of members and get the team to agree to resist these tendencies. Also, within group agreements should be an agreement for the team to stay off of social media and direct communication modes with individual members. If things get tense, one ill-timed or ill-advised tweet or post can undermine the larger effort.
- ➔ **Common Good Proposals.** Wait to develop proposals and bargaining priorities until all members provide input and, ideally, community members as well. Use shared goals with the community to inform proposals developed from a common good bargaining analysis. Make sure proposals do not solely focus on money. Proposals should be diverse enough to include student-centric objectives. Attempt to hold on to those issues throughout bargaining — don't cave early in bargaining because the board claims the topic(s) are not subjects of bargaining. Maintaining a diverse set of proposals reflects the priorities of members and allies and that is a critical part of democratic representation by the bargaining team.
- ➔ **Conduct a Bargaining Assessment.** Use this tool to map out the bargaining climate. What are we likely to face at the bargaining table from the other side? Evaluating the possibilities prospectively will help us prepare for many different outcomes.
- ➔ **Go Beyond Surveys.** Listen to and take direction from members, do not insert staff or experienced bargaining team member “knows best” thinking into proposals. Also challenge the bargaining team to test their thinking and proposals with members and the community so leaders do not assume they know what members need or want. Whenever possible, ask, and be intentional about ways to include historically marginalized communities in the process of issue identification.

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<sup>19</sup> See the Bargaining Glossary VTNEA.doc in the resource section from Vermont-NEA as an early tool for educating local leaders and members on bargaining terms and concepts.

# CHAPTER 2: COLLECTIVE BARGAINING CONSIDERATIONS

## Building on a Foundation

In the latter half of the 20<sup>th</sup> century, most states enacted laws allowing teachers and other public employees to choose union representation for the purpose of collective bargaining. In these states, and in those states where public employers voluntarily recognize and bargain with public employee unions, the foundation was built on principles, practices, experiences, and beliefs of the leaders and staff who were charged with negotiating union contracts. From this strong foundation, unions and bargainers are building a modern collective bargaining structure.

It is important for the bargaining team to reflect the job functions and diversity of the membership. It is also important for individuals on the team to impartially collect and analyze information, advocate for the unit, and work to the best possible tentative agreement.

When forming a bargaining team, it is important to:

- ✓ Review your association's Constitution and Bylaws for the governance requirements.
- ✓ Ensure the team is diverse and reflective of the membership it represents.
- ✓ Train your team, including solidifying their understanding of their individual and collective roles and responsibilities.

As unions continue to expand bargaining teams and redefine team roles, two key trends have emerged from these foundational practices:

- ➔ **Open Bargaining.** Private negotiations are giving way to transparent bargaining.
- ➔ **Bargaining for the Common Good.** Unions are bringing common good proposals to the bargaining table and are fighting for the schools that students deserve.

This chapter takes a closer look at these seemingly simple ideas that require systemic changes to the way we bargain contracts.





## Open and Transparent Bargaining



*Nearly 1,000 association and community members attend a Big Bargaining session between The Fresno Teachers Association and the Fresno Unified School District.*

### **Building Power by Relinquishing Control**

In recent years, labor negotiations have shifted away from closed and private bargaining toward a process that is more open and transparent. Negotiators, often with some initial trepidation, are starting to relinquish a measure of control over the process and are increasingly devising ways to give members and the public admittance to the room where bargaining happens. This represents a fundamental departure from tradition and practice.

Traditionally, bargaining takes place behind a curtain of secrecy. Negotiators meet behind closed doors and updates, when provided, often lack specificity. A typical bargaining update may read something like this:

“The parties met for several hours and made progress on some issues, but we remain far apart on many others. We reached agreement on a couple of items. Our next bargaining session will be with a mediator. Stay tuned.”

Updates of this type continue until either a tentative agreement is reached and members are asked to ratify something that they may not see in its final form until a new collective bargaining agreement is printed and distributed, or the bargaining team needs support from members to apply pressure on a recalcitrant school board. Besides fairness and respect, members are often not fully aware of what they are being asked to support.

This approach is antithetical to modern contract campaigns that depend on high levels of organizing and engagement. On the contrary, if you want members to be engaged, then keep members informed. If you need members to act, then give members timely, relevant, and complete information. If you want public support, then tell the public your side of the story.

The tradition of keeping contract negotiations closed to members and the public is rooted in the concern that sharing detailed information will result in the bargaining team losing control of the process. The justifications for this way of thinking are as follows:

- ✓ *Whatever is communicated with members will get back to management*
- ✓ *It will feed into the public perception that the union is greedy.*
- ✓ *It will make it harder for us to achieve our bargaining goals.*
- ✓ *Negotiations must be private. We are not allowed to share specific information.*
- ✓ *If we lose control, we lose power.*

An emerging view turns this thinking on its head and instead offers these suppositions:

- ✓ *We want management to know our members are informed and poised to act.*
- ✓ *We believe parents and the community know we are advocating for the schools that students deserve and will support us in bargaining and on the picket line.*
- ✓ *Openness and transparency make it easier for us to organize members and gain public support, which will improve the odds of us achieving our goals.*
- ✓ *Even if the law prohibits public bargaining, we are still allowed to communicate with our members and must never agree to restrict or limit any communications.*
- ✓ *If we give up a measure of control, we gain power.*

Bargainers who open-up the negotiations process are rewarded with an engaged and energized membership that feels greater ownership over the agreements that are reached at the bargaining table. Commenting for a [2019 feature story](#) by the New Jersey Education Association, former Watchung Borough Education Association president, Kristen Heller, put it this way, “I’ve never seen our members more engaged in their local association. These are now THEIR proposals.”

## **The Range of Openness and Transparency**

The manner and degree to which local affiliates have made bargaining more open and transparent varies widely. It can range from having one-on-one conversations to gather member input to sharing both sides’ bargaining proposals to making contract negotiations open to the public. A local may try any or all these things, and much more, to increase member and community engagement.

When the Concord (MA) Teachers Association shared its experience with open bargaining, it identified these seven steps as essential to its success with the process:

- ✓ Find out what matters to every member.
- ✓ Develop and ratify a platform for the schools we all deserve.
- ✓ Use a communication loop to keep members informed and get feedback.
- ✓ Bargain beyond mandatory subjects.
- ✓ Open up negotiation sessions.
- ✓ Hear multiple negotiator voices at the table.
- ✓ Never have conversations with management away from the table.



## **TIP:**

**Expand your Bargaining Team for power, influence, and internal/external capacity.** Consider expanding your bargaining team beyond traditional roles and exceeding the floor level numbers in your constitution or bylaws. Increasing awareness and transparency lends for greater union development and sincere partnerships with parents and the community. Be open to involving additional bargaining unit members and the community to be on the bargaining team. In moving to expand your bargaining team, it is vital to never agree to any ground rules that will constrict the number of people on your team and limit communications to bargaining unit members and the public. With or without an expanded bargaining team, broader representation can be achieved by:

- ➔ Adding rotating seats on the team for other members in the bargaining unit to come, observe, and maybe share in caucus or at the table.
- ➔ Including or leaving the opportunity open for bargaining unit content area experts to share when that content area topic is being discussed in caucus and at the table,
- ➔ Involving community members in caucus and as expert guest speakers at the table.

The following checklist is provided to assess the openness of your contract campaign. It is not intended to suggest that a local must do all these things to be effective in a modern bargaining environment. Rather, it is meant to help leaders and staff evaluate the local's current practices and identify additional ways to facilitate movement toward greater transparency.

| <b>HOW OPEN (TRANSPARENT) IS YOUR BARGAINING PROCESS?</b>                                                 |                          |                          |
|-----------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| <b>INPUT TO IDENTIFY ISSUES AND CONCERNS</b>                                                              | <b>Yes</b>               | <b>No</b>                |
| Member bargaining priority survey conducted                                                               | <input type="checkbox"/> | <input type="checkbox"/> |
| One-on-one conversations with members held                                                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Small group discussions with members held                                                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Input solicited from community and external allies/coalitions                                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Issues and concerns go beyond traditional bread-and-butter issues                                         | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>BARGAINING PLATFORM</b>                                                                                | <b>Yes</b>               | <b>No</b>                |
| Input is used to create a bargaining platform that identifies two or three primary bargaining goals       | <input type="checkbox"/> | <input type="checkbox"/> |
| Members are asked to approve and support the bargaining platform                                          | <input type="checkbox"/> | <input type="checkbox"/> |
| Community and external allies/coalitions are asked to approve/support bargaining platform                 | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>MEMBER EDUCATION</b>                                                                                   | <b>Yes</b>               | <b>No</b>                |
| Members are educated on the collective bargaining process                                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Members are educated on the terms and conditions in the collective bargaining agreement                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Members are educated on the principles of unionism                                                        | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>MEMBER INVOLVEMENT</b>                                                                                 | <b>Yes</b>               | <b>No</b>                |
| Member activists and leaders are identified and recruited                                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Action teams are created to support the bargaining campaign (e.g., research, communications)              | <input type="checkbox"/> | <input type="checkbox"/> |
| Organizing/crisis team that is separate and distinct from the bargaining team                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Members surveyed to assess comfort/willingness to engage in escalating levels of collective actions       | <input type="checkbox"/> | <input type="checkbox"/> |
| Members asked to sign up for specific bargaining support/organizing activities                            | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>BARGAINING TEAM</b>                                                                                    | <b>Yes</b>               | <b>No</b>                |
| Bargaining team is representative of the overall membership (e.g., demographics, work location, job)      | <input type="checkbox"/> | <input type="checkbox"/> |
| Size and makeup of bargaining team is not restricted by contract and/or ground rules                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Bargaining team/committee is intentionally large                                                          | <input type="checkbox"/> | <input type="checkbox"/> |
| Individual team members take the lead and speak on specific issues at the table                           | <input type="checkbox"/> | <input type="checkbox"/> |
| If size of team is fixed, members are rotated on/off team so content experts can speak to specific issues | <input type="checkbox"/> | <input type="checkbox"/> |
| Side bar conversations, if held, always involve at least two team members                                 | <input type="checkbox"/> | <input type="checkbox"/> |



## HOW OPEN (TRANSPARENT) IS YOUR BARGAINING PROCESS?

|                                                                                                      |                          |                          |
|------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| Bargaining representatives avoid meeting with management outside formal bargaining process           | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>BARGAINING PROPOSALS AND UPDATES</b>                                                              | <b>Yes</b>               | <b>No</b>                |
| Proposals made on nontraditional issues and/or permissive subjects                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Initial bargaining proposals are shared with members                                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Regular, timely, and detailed bargaining updates are provided                                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Tentative agreements are shared with members                                                         | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>MEMBER COMMUNICATIONS</b>                                                                         | <b>Yes</b>               | <b>No</b>                |
| Collect and keep current member personal contact information                                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Communication with members is not restricted by contract and/or ground rules                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Association reps and/or action team members hold ten-minute meetings to share bargaining information | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>EXTERNAL COMMUNICATIONS</b>                                                                       | <b>Yes</b>               | <b>No</b>                |
| External communications are not restricted by contract and/or ground rules                           | <input type="checkbox"/> | <input type="checkbox"/> |
| Bargaining proposals are shared with the community                                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Message and talking points are developed                                                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Association responds to interview/information requests from media                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Social media is used to support contract campaign                                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>OPEN BARGAINING</b>                                                                               | <b>Yes</b>               | <b>No</b>                |
| Communication forums are designed to educate the public on the issues and proposals                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Negotiations are open to the public                                                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Members are encouraged to attend bargaining sessions                                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Parents/community members are on the bargaining team/committee                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Bargaining proposals are posted online on public site                                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Negotiation sessions are broadcast live on social media                                              | <input type="checkbox"/> | <input type="checkbox"/> |

## Legal Requirements

State laws, and the administrative and judicial interpretation of those laws, vary on whether public sector collective bargaining is open or closed. In several states, contract negotiations are expressly open to the public, though relatively few affiliates in these states that we are aware of, strategically use the statutory requirement for open bargaining. Where affiliates do engage in fully public bargaining, public employers will oftentimes request the intervention of a mediator to close bargaining to the public. Mediation is generally considered private and it is left to the discretion of the mediator or the mediation agency to conduct mediation in an open setting. As a rule, mediators are not inclined to engage in public mediation.

In several states, bargaining is subject to open meeting, or sunshine, laws that require any meeting where a majority or a quorum of the governing body is present to be open to the public. In these states, employers will typically either exclude school board or school committee members from serving on bargaining

teams or hold the number who sit on bargaining teams below the threshold number that would trigger the open meeting requirement, thus keeping contract negotiations private.

A few states do not explicitly allow for open negotiations, but treat proposals and tentative agreements as public documents, making them subject to public review. Typically, it is the media that is most likely to request copies of these items. Other states require tentative agreements or fact-finding reports be publicly posted, a public hearing to allow the public to comment on tentative agreements, or a fiscal analysis of tentative agreements.

Some states permit open bargaining as a permissive subject of negotiations. Both sides must agree to an open process and neither side can force to impasse a proposal to open negotiations.

In other states, bargaining is explicitly private and closed. Though, in some instances, bargaining is thought to be closed until the association forces it open. Absent an unambiguous open bargaining law, it is up the union to decide how far it wishes to push the envelope and determine the things it can do to make the process more transparent. For example, the Fresno (CA) Teachers Association took advantage of a ground rule allowing the presence of “persons with special knowledge relevant to negotiations” by inviting the entire community to attend bargaining.

## FRESNO BARGAINING INVITE

**-JOIN US AT THE BARGAINING TABLE-**  
**-----WITH FRESNO UNIFIED-----**



**THURSDAY, SEPTEMBER 29<sup>TH</sup>**  
4-7PM  
WESTSIDE CHURCH OF GOD  
1422 W CALIFORNIA ST. FRESNO, CA 93706  
FOOD WILL BE PROVIDED

Too many Fresno Unified students are underperforming. While we are graduating more students than ever, only 2% are college ready. Please join us on September 29th to improve academics, lower class sizes, enhance social & emotional supports, and expand career technical education opportunities for students. We will present proposals to district staff to address these issues and more at this Fresno Teachers Association bargaining session with Fresno Unified School District.

Our bargaining rules say that we can invite “persons with special knowledge relevant to the negotiations” to our bargaining sessions. The Fresno Teachers Association believes that parents & community members who have witnessed the struggles of our students and the impact of failed decisions by district leadership, are persons with special knowledge. You do not have to speak or do anything special, just show up. We need confirmation of your attendance by September 24, 2016.  
Email [janette@fresnoteachers.org](mailto:janette@fresnoteachers.org) or call the FTA office at 224-8430 to let us know your attending.

**STAND WITH STUDENTS**



**Fresno  
Teachers  
Association**



\* The fine print

Our bargaining rules say that we can invite “persons with special knowledge relevant to the negotiations.” The Fresno Teachers Association believes that parents & community members who have witnessed the struggles of our students are persons with special knowledge.

2017 CEA Fall Bargaining and  
Organizing Conference

*The Fresno Teachers Association used a liberal interpretation of ground rules to open negotiations to the public.*

## Ground Rules

Formal ground rules for negotiations are something that generally benefit management more so than labor. In fact, ground rules can impede the union in its efforts to negotiate a favorable agreement, especially when those ground rules include restrictions on communicating what is proposed or said at the bargaining table. Whether bargaining is open or closed, an association should never agree to limit communications with members.

Moreover, the association should not agree to a media blackout or to only communicate with the media via joint statements between the employer and the union. Having access to the media provides us the opportunity to control the narrative and get our message out to the public.

Ground rules that place limits on the size of the bargaining team can hamper a union's efforts to make the bargaining team representative of its membership. If bargaining takes place outside the normal school or workday, there is no legitimate business reason to limit the size of the bargaining team. Members are not missing work and there is no cost associated with providing substitutes. Even if the association is unable to increase the size of its team, nothing prevents it from expanding its bargaining support committee or allowing other bargaining unit members to join the team in caucus.

It is not uncommon for ground rules to make their way into the negotiation procedure article of the collective bargaining agreement. It is best to remove language from the CBA that addresses things like team size and communications.

## Norms for Public Negotiations

When negotiations are public, it is the union that is more likely to “pack the room” with unit members, parents, and community members who support what the association is attempting to achieve at the bargaining table. As such, the association should develop behavioral and process norms. The following norms were created by the Saint Paul (MN) Federation of Educators for open bargaining.

In lieu of vocal feedback, some locals provide audience members with clickers to indicate agreement. Also, many locals provide tee shirts with the associations' insignia or encourage members to wear red.

## Bargaining the Best Contract

Recalling her experience with open bargaining while president of the Concord Teachers Association, Kindergarten teacher and Massachusetts Teachers Association President, Merrie Najimy told *Briarpatch Magazine* in an interview for a [2018 story](#), “I think it's the most powerful way that we've ever bargained, and we won the best contract that we've ever won.”

### SPFE Atmosphere Ground Rules for OPEN NEGOTIATIONS

Minnesota state law requires our negotiations to be open, so the parties do not necessarily set or agree to any rules about open negotiations. However, we have always followed these basic rules and share them with audience members:

- Only the elected bargaining team members at the table are allowed to speak. We will invite other members to present proposals as well, but that happens in advance to the session and they are prepped on their presentation.
- Audience members are there to observe and should do so quietly (although sometimes we do encourage folks to applaud or give disgruntled vocal feedback).
- The SPFE bargaining team caucuses with SPFE members in attendance before and after so we can walk through the agenda and debrief the session—this is critical so folks who come have talking points to take back to their buildings.
- There is a set start and end time—usually 2-3 hours. We will end early and sometimes agree to extend later, depends on the agenda.
- Both parties communicate information out afterwards, there are no formal agreements regarding communications. We try to be as transparent as possible in our communications.



However, having members, and ultimately the community, take ownership of the issues and the process poses a unique set of challenges. For instance, one of the most difficult hurdles to overcome in a transparent process is how negotiators prioritize issues without unintentionally tipping their hand to the other side. A best practice for a bargaining team is to blueprint the association's bargaining proposals. Blueprinting is an exercise where each proposal is assigned a level of importance, typically from 1 to 3, with 1 being the highest priority and 3 being the lowest. Then, each item within the respective tiers are ranked in order of importance.

Bargainers need to be intentional in how they strike a balance between transparency and prioritization and should be candid with members and the community about why not all bargaining priorities were realized and what that means moving forward.

Open and transparent bargaining has enabled associations to negotiate the best contracts to increase pay, preserve benefits, and improve working and learning conditions. It is also a vital component of a bargaining for the common good contract campaign.



## Bargaining for the Common Good



*NEA Bargaining for the Common Good Video*

*Go to NEA's Bargaining for the Common Good website*

<https://www.nea.org/your-rights-workplace/bargaining-educator-voice/bargaining-common-good>

### Elements of the Campaign

While public education unions have a long history of advocating for social justice and negotiating working conditions that benefit students, collective bargaining is usually viewed through the narrow lens of negotiations over salaries and benefits. Meanwhile, public education has suffered from chronic underfunding, educators have been blamed, shamed, and reformed to the point of their mental and physical limits, and unions and collective bargaining rights have been under attack.

No longer willing to accept the dismantling of public education and the erosion of their profession, educators, though the unions that represent them, have begun to expand the frame through which we see collective bargaining by making contract negotiations a campaign for the schools that students deserve. Before so named, we had our first glimpse of a comprehensive bargaining for the common good (BCG) strategy in 2012 when the Chicago Teachers Union grabbed the nation's attention with its historic strike, which was soon followed by common good bargaining campaigns in places like Seattle, Saint Paul, and Los Angeles.

Together, the National Education Association (NEA) and the Bargaining for the Common Good network – comprised of Georgetown Kalmanowitz Initiative for the Working Poor, Rutgers Center for Innovation in Worker Organization (CIWO), and the Action Center on Race and the Economy (ACRE) – developed a list of common elements from BCG campaigns.

- ✓ *Go on offense in your campaign by identifying, exposing, and challenging the real villains*
- ✓ *Expand the scope of bargaining beyond wages and benefits*
- ✓ *Strengthen internal organizing, membership, and member engagement*
- ✓ *Engage community allies as partners in issue development and the bargaining campaign*
- ✓ *Center racial justice in your demands*
- ✓ *Leverage revenue campaigns*
- ✓ *The campaign does not end once the union settles its contract*



This section looks at these elements in the context of BCG campaigns run by NEA affiliates.

### **Go on Offense in Your Campaign**

For unions, collective bargaining has increasingly become an exercise in playing defense. Local associations will often go to the table hoping to maintain the status quo. Bargaining priorities focus on preventing the further erosion of benefits, getting a small raise, and mitigating the damage caused by laws enacted and policies adopted under the guise of education reform. Members may be asked to complete a bargaining survey but are otherwise passive bystanders to the process. If organizing takes place, it is usually in response to management's bargaining proposals.

In a BCG campaign, the union does not wait to see what management proposes. Instead, it launches a contract campaign months-ahead of going to the table. The union works closely with members and the community to identify the issues that will shape its student-centered demands. When bargaining starts, management is forced to respond to the union's demands. The union relies on an open and transparent process to keep the focus of bargaining, and the public narrative around it, on the union's message and priorities, which in turn helps to increase member commitment and galvanize community support.





BCG also creates an opportunity to go after the people, policies, and practices that are harmful to students, educators, and communities. BCG campaigns target businesses that receive corporate tax breaks, banks that force students and their families into homelessness, tax policies that advantage corporations and the very rich while underfunding schools and essential social programs, and so called education reform programs and practices that are a ruse for privatization and profiteering from public education.

You would not expect a union to make salary the sole issue in a BCG campaign, but the Denver Classroom Teachers Association did just that when it renegotiated ProComp, Denver Public Schools' convoluted, incentive-laden pay system that was once lifted as a model of education reform. However, DPS was plagued by a huge turnover problem, losing between 900 and 1,000 of its teachers, nurses, counselors, and other educators each year. DCTA capitalized on the mounting frustration with ProComp and the significant role it played in causing runaway teacher turnover to demand more money on base salaries, less money going to one-time incentives, the return to a traditional salary schedule, and a top salary of \$100,000.

The groundwork for the ProComp negotiations was laid in 2016 and 2017 when DCTA, in preparation for negotiations for its master agreement, worked closely with the public to develop a student-centered bargaining platform. The union hosted community forums and a People's Meeting to solicit input and reach consensus on what needs to be implemented to create the schools Denver Students Deserve. DCTA's open bargaining campaign enabled the union to negotiate several positive changes to its master agreement, including giving bargaining unit members a voice in curriculum review and adoption, implementing restorative practices, and promoting whole child supports for students. An agreement was reached on August 31, 2017 in front of some 300 educators and community members who were in attendance and several times that number who watched the drama unfold via livestream on Facebook.

On the heels of the UTLA strike, DCTA received tremendous community support on social media and on the picket line and ultimately won double-digit raises and the restoration of a salary schedule for teachers and specialized service providers with a top salary of \$104,000. In the next school year following the strike, returning teachers received an average salary increase of 15.7% and the district experienced a 33% decrease in teacher turnover.



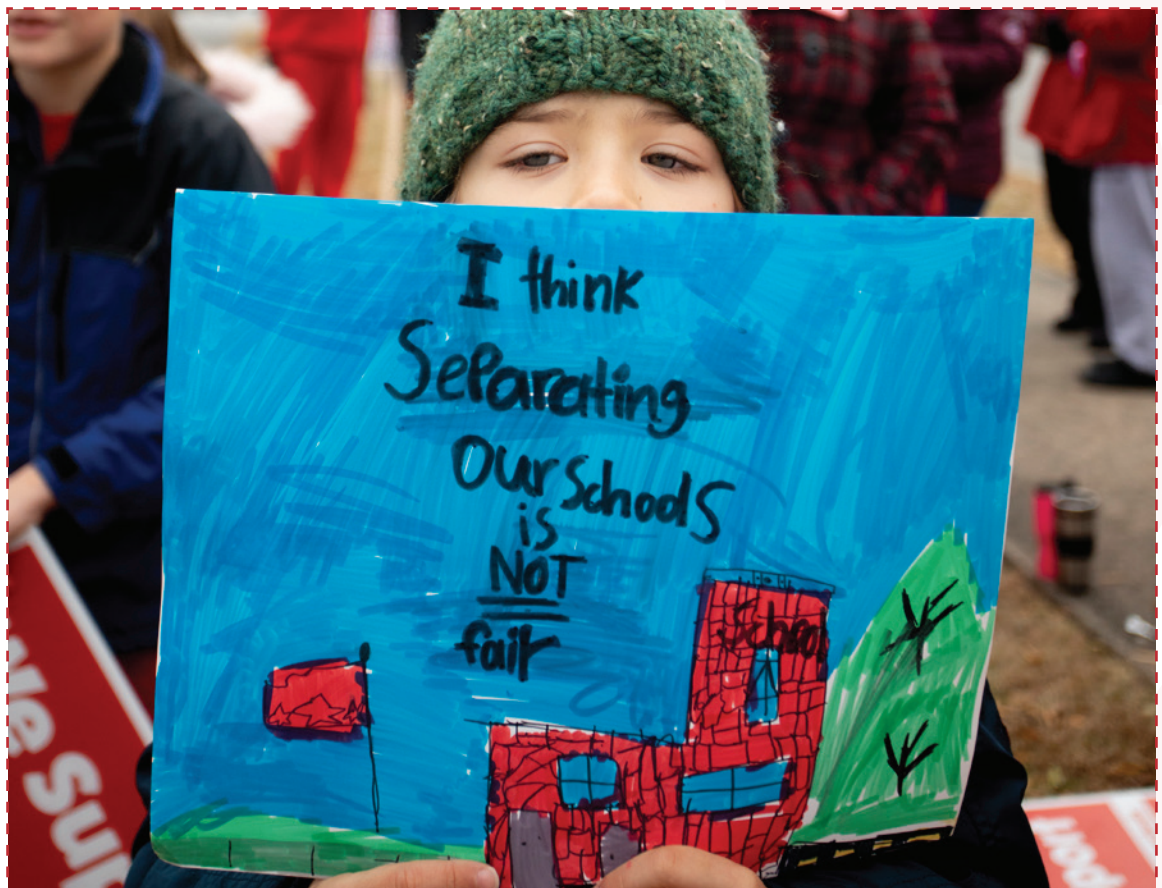
## Expand the Scope of Bargaining

The scope of contract negotiations is generally confined to traditional subjects of bargaining, topics that are deemed mandatory by law or practice. Bargaining for the common good expands the scope of bargaining beyond these mandatory subjects to include permissive subjects as well.

In states with bargaining laws, permissive subjects are topics that either side can propose, and both sides can agree to discuss, but neither party can force a permissive bargaining subject to the point of impasse. In these states, permissive subjects are often not clearly defined in statute and are frequently determined on a case-by-case basis by the public employment relations board that is responsible for administering the bargaining law.

In states where there is neither a bargaining statute nor a law that prohibits collective bargaining, bargaining itself is permissive. The employer must agree to recognize the union and engage in the bargaining process, and it is not illegal for it to refuse to do so even if the parties have a history of bargaining. The absence of a statute also translates to the absence of a defined scope of bargaining. This means that all subjects of bargaining are permissive.

Throughout the relatively short lifespan of collective bargaining in the public sector, unions have generally worked within the confines of the laws (absent laws, the common practices), and focused heavily on the bread and butter issues that most directly impact their jobs and their livelihoods. These are commonly covered under the mandatory subjects of bargaining. Whether because of a lack of knowledge or the feeling of powerlessness, because after all, the employer can simply say “No”, unions have for the most part steered away from taking permissive subjects to the table.



BCG rejects the notion that permissive subjects should not be raised at the table. Instead unions use bargaining for the common good to champion things like

- ✓ Smaller class sizes.
- ✓ More nurses, counselors, and social workers
- ✓ Less testing and more time to teach.
- ✓ Greater support for special education.
- ✓ Restorative practices and ending to the school to prison pipeline.

In 2015, a seven-day strike by 5,000 teachers, paraprofessionals, and other education support professionals represented by the Seattle Education Association was the culmination of contract negotiations that SEA used to bring focus to the lack of adequate recess time at many Seattle elementary schools, disproportionate student discipline, and other equity issues related to the opportunity gap among Seattle students. The strike ended when SEA and the school district reached a tentative agreement that addressed every one of the priority issues identified by SEA members. New ground was broken in exercising power and in building a common agenda with parents for bargaining. SEA was successful in negotiating contract provisions on recess time, equity in student discipline, and limits on testing - all permissive subjects of bargaining.

### **Strengthen Member Engagement**

In BCG, unions rely on surveys, one-on-one conversations, and small group discussions to identify issues that are widely and deeply felt by members. Open-ended questions are asked to make sure members can raise issues that would likely be missed on a standard (rating scale) bargaining priorities survey.

For example, the Concord Teachers Association asked its members:

- ✓ What brings you joy in the work you do with students?
- ✓ What sucks the life and joy out of working with students?
- ✓ What can we propose through bargaining that could increase the joy and reduce the stress in your work?

Once identified and framed, the issues are used to form and build the bargaining platform that guides bargaining and that members are asked to support.

From member surveys, the Columbus Education Association bargaining team established a bargaining platform that included traditional priorities and com <https://members.onepeloton.com/classes> mon good demands. Members were asked to sign off on the platform and commit to the “Schools Columbus Students Deserve” bargaining campaign.

The priorities included in the bargaining platform were:

- ➔ **Reduce Teacher Turnover by Compensating Educators as Professionals**  
#ColumbusStudentsDeserve schools that can recruit and retain the best educators in a stable, consistent learning environment. In Columbus City Schools, nearly one-third of all full-time educators hired since the 2012–2013 school year have since left the district.
- ➔ **Reduce Class Sizes and Caseloads**  
#ColumbusStudentsDeserve class sizes and caseloads that allow educators to provide the individualized attention every student needs to succeed. No student gets the attention they need in a kindergarten classroom of 29 students, a middle school classroom of 35, or a high school classroom of 36.



- ➔ **Fund Schools and Save Taxpayers Money by Ending Handouts to Wealthy Corporations** #ColumbusStudentsDeserve well-funded, properly staffed and maintained schools. When the city and district approve huge tax breaks for wealthy corporations that do not need them, they drain our schools of resources and shift the burden to individual taxpayers.
- ➔ **End the School-to-Prison Pipeline by Expanding Alternative Programs for Discipline** #ColumbusStudentsDeserve alternative programs for discipline, including the restoration of “PEAK” at the middle and high school level and the expansion of the “Options for Success” program. Our union is committed to ensuring safe learning environments for students and educators while supporting proven, effective programs that divert students from the school-to-prison pipeline.
- ➔ **Improve Access to Student Support Professionals by Staffing Adequately** #ColumbusStudentsDeserve access to the support they need when they need it. This includes adequate staffing of Counselors, Social Workers, Nurses, OT/PTs, Library Media Specialists, Language Pathologists and School Psychologists. Currently, each highly qualified Library Media Specialist is shared by two middle schools and up to eleven elementary schools.
- ➔ **Design Schools to Reflect a Commitment to Art, Music and P.E.** #ColumbusStudentsDeserve a dedicated space for art, music, and P.E. Study after study confirms the importance of these “specials,” but many of our school buildings do not reflect this. A real commitment to a well-rounded education means dedicated space for these activities in each building.

### **Engage Community Allies as Partners**

Ideally, the community is involved in identifying the issues that the union takes to the bargaining table in a BCG campaign. At the very least, the community needs to be informed and educated about the union’s proposals.

The union must determine early on how it intends to include the community in its bargaining campaign. Some initial questions that should be asked are:

- ✓ Will the union identify issues and develop a platform or package of proposals to take to the community and ask them to get on board and support?
- ✓ Will the union ask the community for input in identifying bargaining issues?
- ✓ Will the union partner with the community from the beginning and jointly identify issues and develop proposals together?
- ✓ How will decisions be made?

In addition to conducting surveys and holding one-on-one conversations, other ways that unions engage community in their campaigns and work with it to identify issues and develop common bargaining demands are:

- ➔ **Community forum or townhall:** The format of these types of gatherings can range from holding open conversations about what concerns people have, holding smaller table conversations and report out, or identifying a broad or specific issue and asking participants to talk about them.
- ➔ **Setting up a booth or table at local public events:** This can be a great opportunity to engage the public and both share information about the union while also gathering input; a potential pitfall of this type of tactic is the reliance on people choosing to engage or not, so definitely need to consider other tactics beyond this.
- ➔ **Partnering with an established community group:** Seeking out and identifying existing community groups and organizations that hold similar values, beliefs, or concerns about issues that align well with the union’s is a great way to engage community; depending on how well established the group is, it is possible that they may have a strong base of constituents that can be easily engaged.

The Saint Paul Federation of Educators, then the Federation of Teachers, developed an innovative and likely groundbreaking strategy to both engage their members and partner with parents and the community early on in their campaign to identify issues. They decided to organize several small gatherings at the homes of their members and parents where they held “book clubs”. Their readings included *Teaching 2030*, by Barnett Barry, founder and CEO of the Center for Teaching Quality (CTQ), and *The Schools Our Children Deserve*, by Alfie Kohn, described by Time Magazine as “perhaps the country’s most outspoken critic of education’s fixation on grades and test scores.” Led by a facilitator, they held discussions about what they had read in relation to their concerns about the Saint Paul Public Schools (SPPS). Their discussions were based on three guiding questions:

- ✓ What are the schools Saint Paul children deserve?
- ✓ Who are the educators Saint Paul children deserve?
- ✓ What is the profession Saint Paul educators deserve?

It was from these discussions that seven common and consistent issues were raised. Those seven issues are what became the basis for many of proposals that SPFE took to the bargaining table. This was published in a research document put together by the union, fittingly titled, *The Schools Saint Paul Children Deserve*.

### **Center Racial Justice in Your Demands**

When thinking about issues that impact the ability of students to learn and succeed, especially those prevalent in communities and the classroom, one common denominator is institutional racism. As education unions have embraced a BCG strategy along with the rise of the Red for Ed movement, the systemic impact that employer policies, local, state, and federal statutes, and corporate influence have had on Native, Black and Latinx students has been brought to the forefront.

Educators, parents, and community allies have come together with the realization that unless they unite together to address racism head on, then we can never live up to the belief that every child deserves to succeed no matter what they look like or their zip code. In partnership with parents and community groups and movements such as the Alliance to Reclaim Our Schools

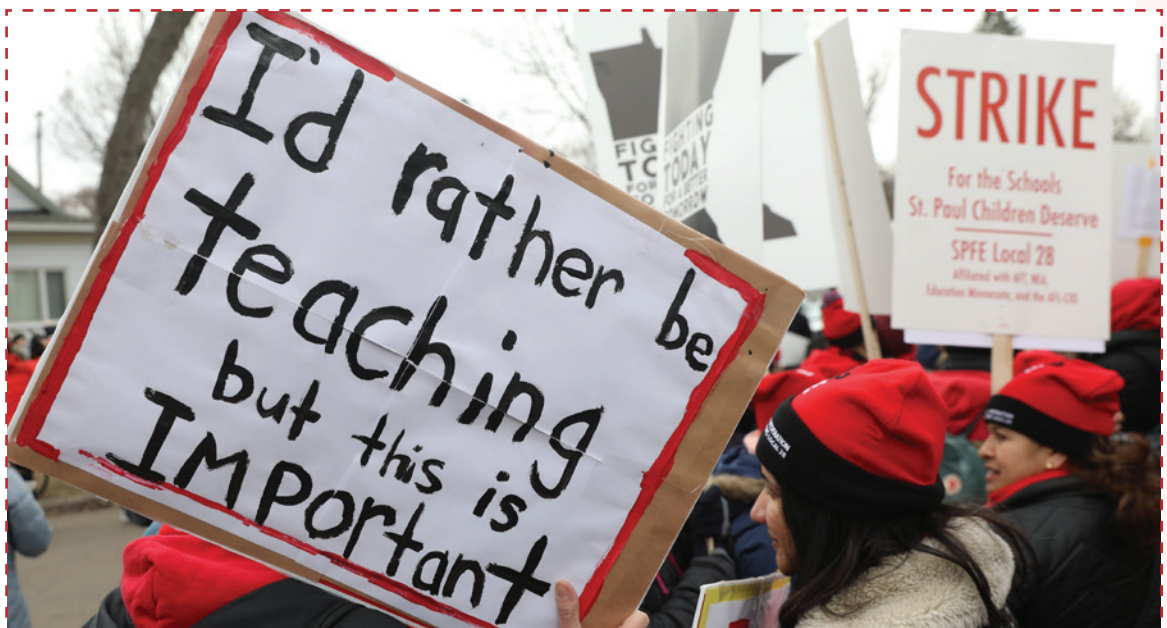


(AROS) and Black Lives Matter, educators have crafted demands through a racial justice lens. They have also gone through the process of looking inward by examining their own practices and constitutions/ bylaws to correct unconscious biases through those same lenses. Examples of some of the racial justice issues and demands include:

- ✓ End harsh disciplinary practices by implementing age appropriate, research based and proven practices to improve school climate, inclusive of restorative practices.
- ✓ Invest in supports and increase staffing to address mental health and trauma, such as nurses, counselors, psychologists, and social workers.
- ✓ Emphasize staff diversity through intentional recruitment and retention, such as Grow Your Own (GYO) programs.
- ✓ Create a more welcoming and safer environment by eliminating metal detectors, bars across windows, and other law enforcement practices.
- ✓ Place a moratorium on charter schools and voucher programs or end them.
- ✓ Establish community schools with smaller class sizes, more parent engagement, wrap-around services, and before- and after-school programs.
- ✓ Devote more funding to school infrastructure to improve air quality, provide heating and cooling, and make certain that safe drinking water is available.
- ✓ Provide better nutrition and breakfast in the classroom.
- ✓ Eliminate business partnerships with contractors and financial institutions that exacerbate racial inequities through practices such as home evictions and foreclosures as well as poor compensation and benefits.

The murder of George Floyd elicited national outrage, sparked protests, and renewed the debate over the presence and role of police in public schools and the school-to-prison pipeline that has plagued students of color, who have disproportionately been targeted with suspension, expulsion, and arrest, completely disrupting their education and dramatically decreasing the chance that they will succeed in school.

BCG provides the opportunity for the union to bargain for contract language that will:





- ✓ Remove, re-balance, or limit police/law enforcement/SRO presence in schools.
- ✓ End law enforcement practices in schools (metal detectors, surveillance, etc.).
- ✓ Increase funding for counselors, social workers, and other essential school personnel to support the social and emotional well-being of students.
- ✓ Adopt and comprehensively implement Restorative Justice practices.
- ✓ Strengthen accountability for SROs and law enforcement engaging students.
- ✓ Mandate that SROs and all educators, especially those charged with supporting discipline practices, receive training in age appropriate responses and interventions, cultural competence, implicit bias, restorative practices and techniques and how to differentiate between discipline and crime and how to respond appropriately.

## Leverage Revenue Campaigns

In addition to scrutinizing school budgets and district spending priorities, associations are beginning to use contract negotiations to advocate for funding solutions to the chronic underfunding of our public schools. For instance, the Saint Paul Federation of Educators launched a bargaining campaign bargaining campaign for its School and Community Service Professionals (SCSPs), Educational Assistants (EAs), and Teachers by delivering an invoice to US Bank for \$1 million in back taxes to bring revenue back into the schools.

The Columbus Education Association took on corporate tax subsidies, targeting CoverMyMeds whose parent company, along with other opioid distributors and manufacturers, was sued by the City for flooding of Columbus with the drug, resulting in substantial increases in drug abuse, overdoses, loss of life, and medical costs. According to Policy Matters Ohio, the tax abatement awarded to CoverMyMeds cost Columbus Public Schools **\$55.5 million**. In bargaining, CEA proposed that the district stop approving corporate tax breaks that are taking vital funding away from schools, students, and the community while padding the bottom line of multi-billion-dollar corporations.

The Sacramento City Teachers Association called district spending priorities into question as part of its overall BCG strategy.

**SCTA**

**Let's Make Sac City  
the Destination District  
for California:**

A Blueprint for Revitalizing Our School District



***“The District is more focused on hiring administrators and building up an enormous reserve, rather than making sure our students can thrive.”***

—Nikki Milevsky, SCTA President

ISSUES

- ▶ Smaller class sizes
- ▶ More nurses and psychologists
- ▶ Access to arts, music and physical education
- ▶ Expand PTHVP
- ▶ Restorative practices
- ▶ Enforce standards for charters
- ▶ Eliminating unnecessary testing (TA)

TACTICS

- ▶ “Big bargaining”— goal to recruit one person from every building to be on bargaining team
- ▶ Community partnerships and involvement
- ▶ Communication & transparency
- ▶ Beyond bread & butter
- ▶ Organizing basics

## Does Not End with the Settled Contract

Most common-good, student-centered goals will not be achieved in a single contract campaign. Associations use the energy from the recent bargain to continue to build capacity, organize and engage members, and strengthen its ties with the community as it continues to advocate for the schools that students deserve.

BCG will become increasingly important as unions fight for the health and safety of members and students in the wake of the global pandemic. In fact, unions and BCG may be the **last line of defense in a reckless crusade** to return to in-person instruction. BCG will also be used to tackle the institutional racism in our country and the vast inequities in our students' educational opportunities laid bare by COVID-19. BCG will be used to:

- ✓ Return safely to in-person instruction and make contingency plans.
- ✓ Develop a communications plan to ensure the entire school community will be informed on an ongoing basis, with the same information at the same time.
- ✓ Form health and safety committees that include representative from labor, management, students, and the community to respond to ongoing health and safety issues.
- ✓ Create equitable access to technology students need for hybrid and distance learning.
- ✓ Work with the food-service staff and parents to determine the best and safest way of implementing ongoing nutrition and food-distribution to students.
- ✓ Seek additional school nurses, social workers, counselors, occupational, speech, and physical therapists, and other specialized instructional support personnel (SISPs) to support increased student needs.
- ✓ Remove law enforcement from schools or repurpose its role, create accountability, and provide comprehensive training.
- ✓ Replace harsh and racially biased disciplinary policies with restorative practices.
- ✓ Launch revenue campaigns and demand funding for public education by putting an end to corporate handouts and tax policies that disproportionately benefit the rich.

Whether caused by COVID-19 or exposed by it, health and safety and human and civil rights are the common good issues that we must take on and BCG will play a key role in **educating through crisis** and shaping our future forward.

## CHAPTER 3: BUILDING A STRIKE OR WALK-OUT CAMPAIGN

Strikes can be a tactic used during a campaign with a lot of careful preparation. Strikes are never the goal, even though our opposition may try to build a narrative asserting the strike was pre-conceived and forced upon members. Strikes are the reaction to the employer or state pushing members to a point of no alternative option other than to withhold their labor and take a stand. Strikes are also a major compression point in an escalation campaign full of smart tactical planning that incentivizes settlement or resolution well before the strike occurs. Any strike buildup should include multiple opportunities for the targets to do the right thing. If they do not respond, then we escalate and move towards a strike.

Our political climate is often unpredictable and thus advice and resources in this chapter are best used with an eye towards flexibility and creativity. Modern communication moves quickly and is far less predictable and controllable than the early strikes of the 1970s and 1980s. This chapter will help you understand what elements help build a successful strike, knowing that in times of urgency, we can also prioritize parts of this chapter to simply do the best we can to achieve a positive outcome for members.

When is a local union ready to take on a strike? An assessment can help staff, local leaders and members better understand the current state of the union, help bolster areas that need to be strengthened, and create a realistic strategy. However, it is important to note that there is no perfect strike scenario. An assessment also allows staff to understand what additional resources may be needed, what pressure points to use with the opposition and what issues to elevate within messaging. Most members rarely face a strike in their career and the prospect of walking off the job may be challenging — this may appear in an early assessment. **A good campaign strategy builds member confidence, resolve, and courage to take more significant action over the course of a campaign, so do not underestimate members' willingness to act early on.**





## Internal Operations

### **Build a Local Crisis Committee**

If a committee formed early for campaign preparation, modify the committee's charge to a strike build. It is ideal to begin the final strike preparation work at least two-months ahead of any potential strike date. The crisis committee should work closely with state and sometimes national affiliate staff to build the strike strategy. High-level decision-making such as settlement goals or official union responses to employer tactics should be made by governance. The committee, working with member input, should be empowered to draft a tactical plan, set a timeline, and decide basic pieces necessary to build the plan (e.g. color of t-shirts, button slogans). It can also provide input to governance and the bargaining team, but ultimately on the crisis committee's charge is to design and implement the crisis plan.<sup>1</sup>



### **TIP:**

In a smaller union, Area Coordinators are not necessary and crisis committee members from each worksite would be sufficient and may hold another liaison role as well.

In some cases, the committee will rely heavily on staff to help advise and build the campaign. In other places, members may want to take on even more of the responsibilities. In either scenario, work to encourage cohesion between the committee, staff and local governance and then work to define roles and responsibilities. In regional or statewide<sup>1</sup> campaigns, staff, leader and committee cohesion becomes even more paramount to the campaign's success. All successful campaigns require smart, strategic cohesion within the union. Any disunity or division will harm the campaign and the long-term health of the union.

### **Build the crisis committee<sup>2</sup> to include:**

- ➔ **Representatives.** from every worksite and be intentional to identify underrepresented groups such as new or early career educators and members of color, etc.
  - ➔ **Chair.** A crisis chair that is well-respected and confident. The Chair also serves as the liaison with state or regional governance to keep them informed of real time developments in the campaign and coordinate approval of necessary next steps. The Chair may also serve as the bargaining liaison.
  - ➔ **Members Per Worksite (small to moderate sized unions) or Area (Zone) Coordinators (large union).** Well-respected members because the committee will often These people can also serve as picket captains mentioned below. They should be included when planning and discussing strategies to build a tactical escalation plan.
  - ➔ **Community Outreach Liaison(s) Coordinator(s).** (Members who connect with the community and parents and focus solely on activities which bolster their engagement with the campaign.
- Optional:**
- Community Member Liaison(s).** Members of the community who are strong allies and can provide direct support and coordination with their networks and community organizations.
  - Solidarity Liaison(s).** Members who connect and coordinate with other bargaining unit members, other unions and unorganized employees in the district or university.
  - ➔ **Communications Liaison(s).** Members charged with message development (internal to members and external to the public/media), including the official spokesperson (President or designee) and social media strategy and postings. This team of member should also include a rumor control person who is dedicated to fielding and responding to rumors that emerge.

<sup>1</sup> See Arizona case study in Organizing Success Stories section.

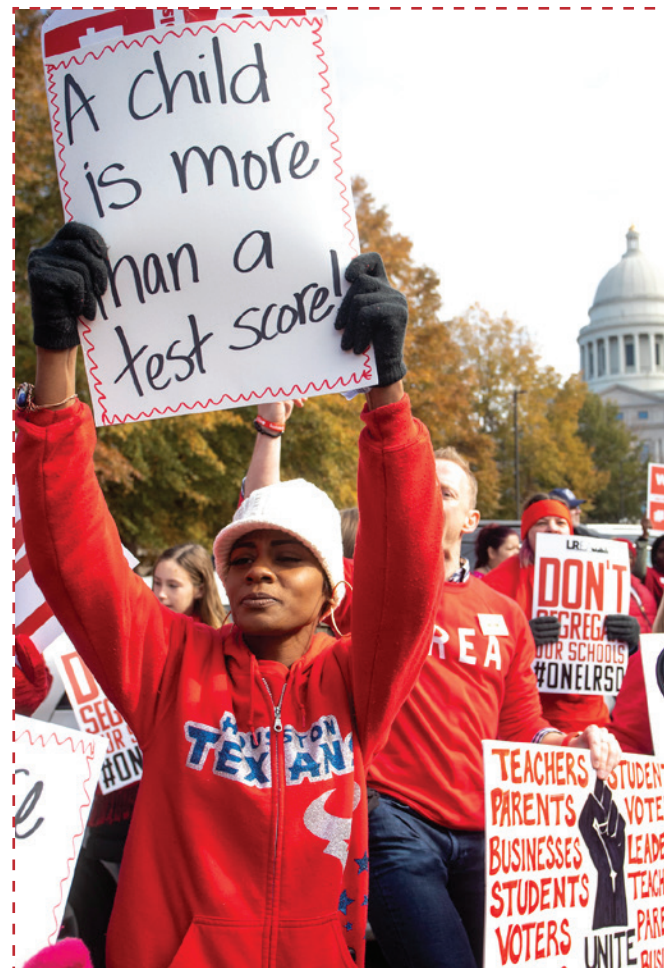
<sup>2</sup> See the Summary of Strike Organization Roles for Staff and Leaders.doc (with more detailed job descriptions for each role listed below) in the resource section.

- ➔ **Logistics Liaison(s).** Members tasked with specific things such as being a police liaison for public events, rally logistics for large-scaled actions requiring multiple moving parts, and volunteer coordinators to organize volunteer tasks.
- ➔ **Research Lead.** A member(s) to conduct research about the employer or target as needed.
- ➔ **Picket General(s).** Leaders of the picket captains who oversee field operations and day-to-day strike operation decision making once on strike. These should be well-respected leaders who can make sound decisions under pressure.
- ➔ **Picket Captains.** Captains may or may not serve on the crisis committee given the size of the union. Assemble captains based on worksites with a 1:12 ratio of captain to members on a picket team. Assign potential members to picket teams as well to make sure they are included in strike related communications and requests for action. Captains should be reliable, organized, and confident leaders. For smaller unions, captains may need to serve other crisis committee roles. Also consider organizing picket captains for other bargaining units such as teachers for an ESP strike or professional staff for a university faculty strike, so those employees have an organizational structure in place leading up to a strike.
- ➔ **Strike Headquarters Coordinator.** Member charged with finding, outfitting and organizing the strike headquarters space in coordination with staff.
- ➔ **President.** Serves as an ex-officio member who is included on all communications, official spokesperson (unless otherwise designated) and in the loop on developing strategy in real-time.
- ➔ **Bargaining Liaison.** A member dedicated to sharing and summarizing crisis committee planning with the bargaining team and/or Chief Negotiator to keep the team in the loop on developing strategy in real-time. The bargaining team should also inform the liaison and/or crisis chair of developments related to bargaining to notify the crisis committee of new bargaining dates, actions by management, and important developments that may impact the timeline.
- ➔ **Staff Advisors.** Staff coordinators assigned to organizing, communications, bargaining and legal issues to work in tandem with the local UniServ Director. Staff advisors should train the appropriate roles on the committee listed above based on their expertise. The training should include role responsibilities, what the road ahead looks like, and how to do their role. We recommend using the role definitions in the resource section as the basis for these trainings as well as relevant parts of this chapter.

#### Suggested roles include:

- ✓ Strike Coordinator (Organizer)
- ✓ Bargainer (UniServ Director)
- ✓ “Shadow” or Assistant Bargainer
- ✓ Communications Coordinator
- ✓ Attorney
- ✓ Optional: Operational or Administrative Staff

For larger unions, these roles can become sub committees (communications, picket captains and coordination, community action, etc.) with additional people to help expand and share the work. If this is



the case, appoint chairs of the subcommittees who will serve on the executive strike crisis committee to keep the entire campaign coordinated. For very small unions, these roles are still critical to fill even with small numbers. For smaller unions with limited diversity in job titles (example: only janitors or only general paraeducators), leadership should assess whether a strike is advisable or whether an alternative strategy to align with another bargaining unit in the future may be more powerful.

**Some of the more common roles include:**

- ➔ **Regional Coordinators per Region (or per Local Union).** Well-respected members because the committee will be often planning and discussing strategies outside of members' initial comfort zones to build a tactical escalation plan. These Coordinators are assigned local unions to push out organizing strategy and tactics. Local unions designate their own local committees to engage local communities, members and employers in the campaign.
- ➔ **Research Lead.** A member to conduct research about the employer or target as needed.
- ➔ **Legislative Action/Strategy Liaisons.** Members to work with government relations staff to develop strategy specific to legislative actions.
- ➔ **State President.** Serves as an ex-officio member who is included on all communications and in the loop on developing strategy in real-time.
- ➔ **Staff Advisors.** Staff coordinators assigned to organizing, communications, government relations, advocacy, and, when necessary, legal issues, to work in tandem with certain roles on the committee. Staff advisors should train the appropriate roles on the committee listed above based on their expertise. The training should include role responsibilities, what the road ahead looks like, and how to do their role.

Depending on where you are in the plan, it should meet every 1-2 weeks as the timeline heats up. Every meeting should include:

- ✓ A temperature read of each worksite — How is member participation? Any concerns about the next part or upcoming tactic? If so, how do we address those concerns?
- ✓ A review of what worked since the last meeting.
- ✓ A review of what did not work and why.
- ✓ A review of what is ahead and adjusting or affirming the next tactical steps.
- ✓ A discussion on whether we need to adjust our plan to address unexpected internal or external developments (ex: employer response). It is important to adapt, but to also stay focused on the plan and not get distracted by unnecessary things.
- ✓ Are we moving towards our goals? If not, why and how do we get back on track?
- ✓ Is member engagement increasing? Is community support growing?
- ✓ Do we need to escalate or deescalate our plan? Why?
- ✓ Where are the emerging leaders and how can we bring them into the campaign?

NEA's Hierarchy of Choices for Planning and Jefferson County Education Association (CO)'s leadership campaign tools help define who sets the vision/goals of a campaign and how and who builds the campaign. In the sample crisis committee structure the dotted line to staff indicates the advisory role staff play in local decisions as well as the role of governance. Remember, creating clear roles and responsibilities that value coordination and cohesion is essential to success.



## Hierarchy of Choices for Campaign Planning

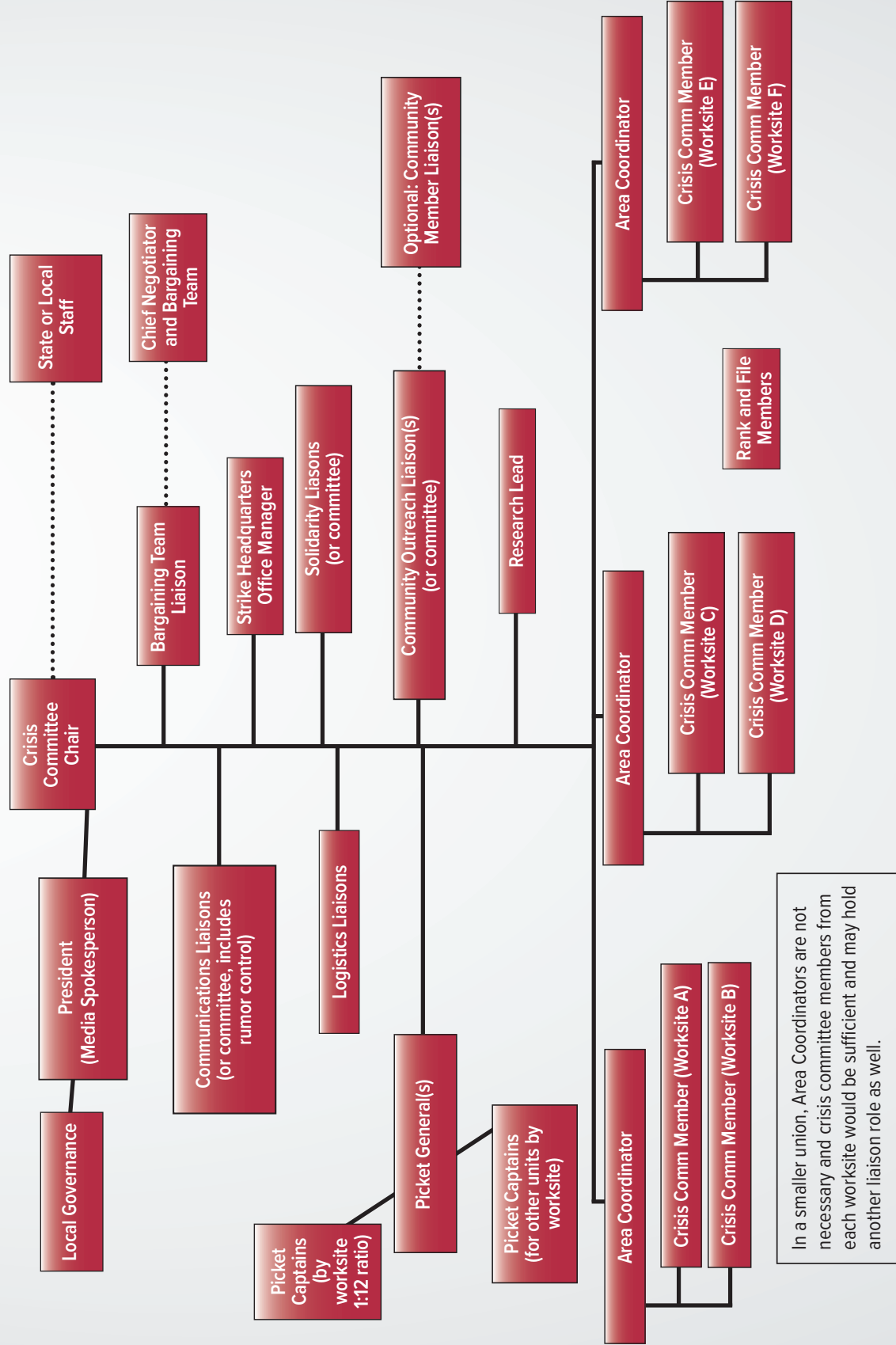


### Governance and Staff: Roles and Responsibilities

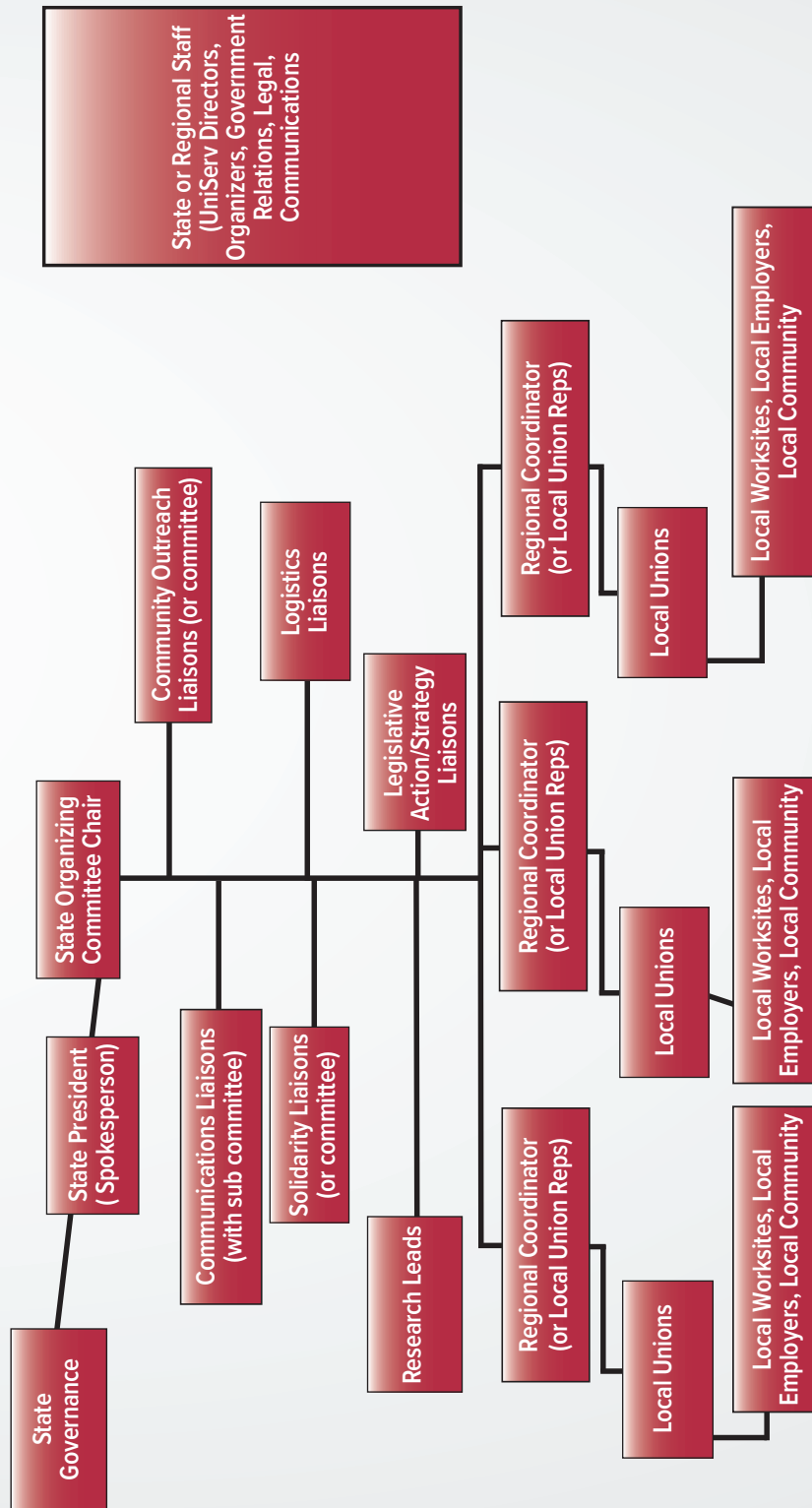
| Local Leaders |          | Staff                                            |             |          |
|---------------|----------|--------------------------------------------------|-------------|----------|
| Responsible   | Involved |                                                  | Responsible | Involved |
| X             |          | Governance                                       |             | X        |
|               | X        | Administration                                   | X           |          |
| X             |          | Decides What                                     |             | X        |
|               | X        | Decides How                                      | X           |          |
| X             |          | Makes Policy                                     |             | X        |
|               | X        | Carries Out Policy                               | X           |          |
| X             |          | Sets Strategic Goals                             |             | X        |
|               | X        | Plans Strategic Goals                            | X           |          |
| X             |          | Reviews Strategic Goals                          |             | X        |
|               | X        | Implements Tactical Plans<br>(leaders in action) | X           |          |
| X             | X        | Monitors Progress                                | X           | X        |

Source: Jefferson County Education Association

# Sample: Moderate to Large Union Crisis Committee Organization



# Sample: Statewide (or Regional) Crisis Committee Organization



In Arizona in 2018, local unions had additional structures set up including walk out captains, classified staff outreach captains and local community outreach captains. They also used a phone tree referenced in the resource section.



## Union Cohesion

Work to define norms, decision-making authority, roles and responsibilities to prevent unnecessary confusion and conflict especially as the campaign heats up towards a strike. Within the norms, take time to

discuss how to handle conflict and resolve it when it comes up, both between members, leaders and staff. Most importantly, who has the final word when critical decisions need to be made in the bargaining room, on the picket lines or in response to an employer tactic to intimidate the members? As we build towards a strike or walk-out, sometimes it is useful to create a core team of member leaders and staff to become the critical decision makers when things get tough. Always make sure members have a central place in decision making alongside staff to develop their ownership and willingness to personally engage in the buildup and to also get other members fully engaged.

In some state's educators formed or are forming grassroots organizations to connect and build collective analysis on ways to improve public education. These organizations may be informal and largely virtual in organization or they be more formally organized. Either way, they represent an important constituency within the union and should be invited to the table to help support and organize the strike. We do better when we stand together and make room for more voices and perspectives.



Staff should play a steady role of advisor and cheerleader to bolster the membership despite what emerges during the campaign from the employer or community. As such, all staff involved in the campaign must also be cohesive and consistent in the advice and support they offer to the local union. Ideally the state affiliate or regional office will pause “business as normal” operations to focus on supporting the local union on strike and offering the staff support necessary to win. Successful strikes create positive momentum for the immediate region but also the state. It sets the bar for illustrating the political and organizing power of the union and should be supported as an organizational priority.

Take time to build a staff team ready to support the needs identified for that specific union through the earlier assessment role. Here are the core staff roles for local or statewide strikes:

- ✓ **Organizing** — Staff available early to support the crisis committee get organized, build a campaign strategy, and advise and support field work before, during and after the strike. This is a big role and is best done by more than one staff person, especially as the strike date approaches. However, it is also important to have one overall strike/crisis coordinator to keep the whole undertaking moving in the same direction.
- ✓ **Communications** — Staff available to support the communications point people develop internal communication methods and templates, access peer-to-peer texting tools, offer media training, and help develop a frame to create an effective message.
- ✓ **Bargaining Support** — A local union will have an assigned UniServ Director in most cases, but a “shadow” bargainer brought in during critical bargaining preparation meetings and bargaining sessions before and during the strike can help ensure critical details are not missed during

intense and exhausting times. This role can also be a helpful mentoring opportunity for bargaining staff who have yet to be involved in a strike.

- ✓ **(For Statewide Walkouts) Legislative Support** — Government relations staff available to help build coordinated strategy on active state legislation or policy as well as education on the legislative or policymaking process.
- ✓ **Legal Assistance** — A staff lawyer assigned with ample time before a strike date to help monitor legal developments, assemble and file necessary unfair labor practices, prepare for potential injunctions (page 88), and advise membership meetings on state law and legal options for members related to COBRA rights for insurance, wage withholding, and temporary replacements among other things.
- ✓ **Optional: Operational and Office Staff** — Staff to handle setting up a functional office space for the strike, including setting up office equipment, utility accounts, lease arrangements, and temporary cell phone plans to create systems to help the strike run smoothly in the field.



When the team is forming, questions to consider include:

- ✓ Are the right staff engaged in the campaign (skill set, personalities, experience)? Do we have other options?
- ✓ Do we have enough staff available in all the required areas (organizing, legislative, advocacy, legal, communications) for the campaign?
- ✓ Is the buildup large enough where we will need to ask for shared-staff support through the NEA or the state affiliate? If so, what is needed for visiting staff to hit the ground running?
- ✓ How will additional staff be on-boarded to be effective in the buildup and with members?
- ✓ Is this a good opportunity to encourage less experienced staff to get involved to gain strike experience?
- ✓ Who will manage the staff team and how can that person be supported in that role?
- ✓ Who is available to “tag in” during the weeks leading up to the strike and during a potentially long strike? How do we avoid staff exhaustion and also ensure that transition between staff members is as smooth as possible?

### **Understanding the Opposition<sup>3</sup>**

Build a background file on each school board member, superintendent, district bargainer and other key district figures. For higher education build-ups, collect background information on each board of trustee member, college/university president, provost, and employer bargainer. For statewide efforts, identify key legislators, state leaders from the agency of education, and the governor. Collect address, home and business phones, place of employment, family data, political leanings, clubs and organizations, past jobs, length of current service, major money interests plus other useful information for each of these people. This information should be used to inform the buildup strategy, planning tactics and messaging.

<sup>3</sup> See Employer and Board Assessment Tool.docx in Chapter 1 of the resource section.

| Common Employer Tactic                                                                                                                                                  | Suggested Response                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Threaten and/or end health insurance for striking employees</b>                                                                                                      | Know the health insurance rules and process for the employer. Do research early and inoculate members with knowledge, including their COBRA rights. Encourage members to schedule procedures before potential strike dates (if possible). Also, if such action were attempted, this would be important information to share with community allies and good to share with media to shame the employer for focusing on harming educators instead of bargaining a settlement. For statewide action, state affiliate staff should spearhead collecting information from all the major insurance providers in the state.                                                                                                                                                |
| <b>Threaten and/or end health insurance for other employees not on strike</b>                                                                                           | It is likely illegal for an employer to end the insurance coverage for a non-striking group of employees due to a labor dispute with other employees. If the employer still takes or threatens those actions, consult with legal counsel to craft a response to this threat.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Threaten and/or withhold wages for days on strike</b>                                                                                                                | In some states, it is legal to withhold wages for days not worked, even for salaried employees. Often days can be made up later in the school year to ensure student contact days are completed to comply with state law. However, the best response is early preparation by members and education by the union on how to prepare.                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Threaten and/or replace employees with temporary or permanent staff</b>                                                                                              | The legality of replacing striking employees varies by jurisdiction. Even where replacement is unlawful, employers may threaten it. If this is attempted or acted upon, activating the community and parents to advocate for student safety can help stop this tactic in its tracks. Can you imagine untrained, unlicensed, and unknown temporary employees working with students? Even if the district could do required background checks, why is the district spending money on this instead of settling the contract? Proactively call temporary employee agencies, substitute lists and any other source of labor to dissuade people from getting involved in a labor dispute. This works particularly well in rural areas where many people know each other. |
| <b>Promise to settle better terms with another bargaining unit (same or different union) who is also bargaining with the same employer leading up to the strike</b>     | This is a classic way to undermine any solidarity developed between organized workers. It is critical to develop early solidarity relationships between unions under the same employer to prevent each other from undercutting each other.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Threaten to and/or keep schools open</b>                                                                                                                             | This is often tried with ESP strike build ups. Similar to hiring replacement workers (see above), ask the community to advocate for students' safety by challenging the employer's poor choice to keep schools open either understaffed and/or full of temporary employees. Leverage specific ESP roles to strengthen arguments on why keeping schools open during an ESP strike is a bad idea. (e.g. "who do you trust to drive your student's school bus?")                                                                                                                                                                                                                                                                                                      |
| <b>Blame striking employees for causing safety issues for students who will not be in school</b>                                                                        | Educators' teaching and working conditions are students' learning conditions. Educators do not take the idea of striking lightly. Emphasize the disputed issues and what is at stake. Educators are taking a stand for the overall health and safety of the entire school community.                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Blame striking employees for cancelling major school or university events because they went on strike</b>                                                            | Educators' job is to educate and that is the primary loss to the community during a strike. Plus, the decision to cancel any school or university events is that of the school leaders, not the educators. We are simply boycotting our participation as an extension of our labor rights.                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Blame striking employees for harming students by preventing them from accessing food, shelter during the day, academic learning, (enter in whatever topic), etc.</b> | Educators provide essential support for students beyond academics, but they are also fighting for issues that improve the learning conditions of students (name them). This is larger than a few days of missed schools. Proactively work with community organizations to support the most vulnerable families with free childcare and food access ahead of the strike. During the 2018 statewide walkouts, union-run food programs for students helped preserve widespread public support.                                                                                                                                                                                                                                                                        |
| <b>Blame striking employees for extending the school year into the summer</b>                                                                                           | This may be the case, but it is worth improving the school community, learning and working conditions of educators and students.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Close schools and blame striking teachers for causing hourly workers to lose wages due to lack of work</b>                                                           | This is not the intent of the striking educators. In some cases, employers could reassign staff to do work during the days of the strike to catch up on maintenance, curriculum or classroom organization or even offer professional development training to these employees. However, in the worst case scenario, if there is no work, hourly workers (usually ESPs) are not required to be paid. In this case, offer the union's assistance to file unemployment claims for impacted employees who are not part of the strike regardless of union membership status.                                                                                                                                                                                             |



| Common Employer Tactic                                                                                          | Suggested Response                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Threaten to fire striking employees, especially probationary employees or non-tenured teachers or faculty       | Consult with your attorney to assess the legality of such threats and to craft a legal response. In any event, encourage members to recognize that if we act together in large numbers, it makes it much harder for an employer to fire all the employees, especially given the difficulties of hiring specialized teachers and staff positions. Plus, a mass firing could quickly turn the community against the employer. It could also be illegal for the employer to single out non-tenured or probationary teachers if other employees are taking the same action. |
| Threaten to discipline or fire employees for lack of loyalty to the employer                                    | Check all pertinent language in the local collective bargaining agreement or employer policies. However, acting as a union is a protected legal action in many states and any loyalty assertions by the employer should be challenged if actions are part of a concerted union campaign.                                                                                                                                                                                                                                                                                |
| Threaten to end visa sponsorship for any non-citizen employees                                                  | Permanent legal residents should possess the same legal rights to participate in union activities as their citizen counterparts, but undocumented immigrants face significant legal risks. To minimize personal risk, encourage anyone in this situation to take on behind-the-scenes work to limit their exposure and pressure by the employer to target them based on their citizenship status. Consult with your attorney about how best to protect non-citizens.                                                                                                    |
| Publish communications or a website attacking the union and/or the union's messaging to gain community support. | Make sure the union is ahead of community messaging and outreach, so parents and supporters know the facts and real reasons for the potential strike. Be accurate, fair and compelling so the union becomes a trusted source of information.                                                                                                                                                                                                                                                                                                                            |

## How They Try to Divide Us — Common Tactics

Employers, even small rural ones, will likely take negative steps to intimidate members ahead of a potential strike. Work with local leaders and the crisis committee to inoculate members since many may not believe their employer would ever try such tactics — this is an educational, learning community after all. Also, be prepared for the employer to even use illegal actions if things get heated. Empower the crisis committee to continually educate members and support each other as these tactics are tried and how to respond. Consider conducting an assessment of the employer early on so we are prepared for their likely responses and know how they plan to oppose the union's strike build up.

## Buildup Planning — Escalation through Tactical Planning

As a campaign progresses and moves toward critical compression points, tactics must escalate in order to bring about a settlement, ideally before we reach the strike or walk-out date. Sometimes plans need to be modified along the way to react and address real-time developments within the membership, with the employer (targets), and community. Start with where the members are in terms of their willingness to act and then move members forward with more assertive actions. It is important not to get too far ahead of the members with tactics and continuing to move members strategically out of their comfort zones to exert necessary pressure on targets.



It is important to build a realistic **timeline** that is concentrated and has a clear **strike or walk-out date** to focus the energy of the campaign and maximize the pressure on the target. A strike buildup without a date is impossible to sustain and will eventually fizzle out. If a strike is ill-advised based on the earlier assessment, consider building a campaign culminating in a major action other than a strike.

Set a date using the following criteria:

- ➔ **Pay Cycle.** Know the pay schedule, pay cycle and pick a strike start date that is within a couple of days of a paycheck, so members are “whole” before the strike begins and we avoid any strange threats of withholding a paycheck for wages/salary already earned once on strike. Make note of when the next pay cycle ends to plan ahead for potential lost wages.
- ➔ **Big School or University Events.** Make use of large school or university events and be strategic about striking before or after such events. The Brandon, Vermont ESPs won huge community support for their potential strike *after* deciding to delay their strike until after the big homecoming football game. Given that the school district threatened to keep schools open during their ESP strike, gaining more community support became the priority over being on strike and boycotting the football game.
- ➔ **Opening and End of School/University Year and Vacations.** Note the opening of and end of school dates. Some states leverage the opening of school dates, such as Washington, to keep schools closed at the opening of the year. In all K-12 cases, be careful not to strike too late in the year to avoid state rules and laws related to minimal student contact dates and the necessity of completing those dates to allow the year to count for both students and years of service for staff retirement systems. An employer could make an easy injunction argument if a local union waited too late in the year and went out on an open-ended strike and ran out of days to complete an official school year. School vacations can also be tricky. Striking too close to a pre-schedule vacation may cause the employer to “wait it out” and force the union to be on an extended strike over vacation. This can hurt momentum and member resolve since many families and students already planned to be out of school for those vacation days.
- ➔ **Bargaining Laws.** Know the state bargaining laws and any required waiting periods before being able to strike.
- ➔ **Health Insurance Premium Payments.** Avoid striking near the date when the employer pays the monthly health insurance premium. It is harder for employers, but not impossible, to temporarily end health insurance coverage once the premium is paid and most pay the premium a month in advance. Consult with counsel because employers may be prevented from legally ending insurance during a strike. Of course, employers often still make threats and take illegal actions to try to break a strike, so be prepared for anything.
- ➔ **Summertime.**<sup>4</sup> Summer can be a useful time to work on a strike build up work, but it can also be a challenging time to get anyone’s attention — our members or the community. If we know summer will be part of the timeline, start initial organizing in the spring before the school year ends and consider creative tactics to keep the energy and attention of the members alive.

As we build the timeline, use known **important dates** within the school district or university, such as board meetings, opening of school, high profile parent events, prospective student day, alumni events, athletic events, parent/teacher conferences or employee-related dates like employment contract return dates or professional development events where members will be together in mass. These are critical dates for highly visible tactics, media attention and community outreach efforts. For days potentially on strike, look for major school or university events and create criteria for how to evaluate whether to boycott

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<sup>4</sup> See Summer Crisis Organizing Guide from Vermont-NEA in the resource section for organizing tips.

those events if the employer looks to blame the union if the event were to be cancelled during a strike. Handle each event on an individual basis. In K-12 strikes, if students spent money for a field trip or event, it is advisable to allow the event to continue despite the strike and simply find community members to step in as chaperones while asking striking staff to not participate. We will win more goodwill this way and hold students harmless in the labor dispute.

Whenever possible though, try to treat extracurricular activities as an extension of the work educators provide the school district or university and boycott them during the strike. In some cases, the risk of a beloved athletic event not happening due to a strike can be the strongest leverage point to get the employer back to the bargaining table.

For higher education strikes, leverage points in the schedule related to midterms, final exams, alumni events and graduation — when visibility and pressure is highest on campus. Avoid striking when students are not on campus or highly distracted, such as spring break or final exams. Review the academic calendar to see where opportunities and obstacles may be for taking actions in the calendar. Make sure to research when the Board of Trustees (or Board of Regents or Board of Supervisors — whomever signs the collective bargaining agreement) meet during the year and consider using these dates to plan large actions and/or the beginning of the strike so these decision makers are on campus. Strategically use the faculty's teaching schedule to our advantage by scheduling rallies and organizing work during the day to build pressure on management leading up to and during the strike. Faculty have greater flexibility than K-12 educators who are locked into a 7 or 8 hour workday every day.

For state actions, also consider key legislative dates such as budget votes, legislative committee meetings, state agency of education meetings, public events held by the Governor, etc. State or regional events should also consider local factors in the school year calendar as it will impact members' participation and can also provide decentralized pressure points around the state.

Once we set the strike date, work backwards to **plan the tactics and escalation strategy**. Every tactic should serve a purpose — internal morale boosting, internal member engagement growth, external visibility, community engagement growth, etc. Every tactic should build upon itself in terms intensity, engaging more members and placing more pressure on the targets to settle the contract. Know when to start and end a tactic. Most tactics have an “effectiveness” shelf life and once exhausted the tactic loses its effectiveness and it is time to move on. Good tactics and actions help us build a credible threat of a strike. A credible threat is itself an escalating action that targets will take seriously.





Work to rule is a concerted effort to work to the letter of the contract and/or to the letter of personnel/workplace policies and not an ounce more. As with all tactics, work to rule should be done as part of a well-developed plan that includes other escalation tactics. Before identifying potential work to rule tactics, consult

with counsel to determine the contractual and job requirements and determine what is required and what is voluntary. Any required activities must continue otherwise we may put members at risk of violating the contract. Consider what tactics impact students the least and management the most. In one work to rule campaign in Maryland, the decision by the faculty at one high school not to write college recommendations (a hugely time-consuming task outside of regular work hours) created massive blowback in the community and did long-term damage to the union's reputation in the community. Our targets remain management and we want to impact students as little as possible to settle the contract.

Consider the effectiveness and willingness of our members to take part in work to rule actions. Some activities will be embraced, such as leaving faculty or staff meetings at the required time they end, while others could cause friction, such as not responding to work related emails after work hours, depending on the membership. Make a list of all the possible actions after reviewing the contracts and workplace policies and then pick small, moderate and advanced options. The Maryland situation arose when the local left it to individual schools to decide on their own work to rule actions. Allowing each school to decide allowed each faculty to take some action that was within their comfort zone. But without some parameters — it back-fired due to the decision at one school. As with many tactics, work to rule loses its effectiveness over long, extended periods of time, so use them effectively and efficiently to make a point.

Allow room organizing committees to generate their own tactical ideas to encourage creativity. This creates member ownership of the campaign and motivation to actively recruit their colleagues to participate in the campaign.

Some tactics are best used as a one-time event whereas others could be repeated depending on the overall timeline and strategy. Consider the pros and cons and capacity of the local union and what is necessary to win the campaign. Every tactic does not work for every union. We can always ask solidarity organizations or groups of parents to help and take on tactics that are outside the capacity or ability of the union. Finally, with any escalation campaign, make sure the leadership is in control of the timeline and pace of the campaign and stays ahead of the members by anticipating what members need and adapting as necessary. Here are some **basic, entry-level, moderate and more advanced tactics** to consider when planning a strike:



## Sample Tactics<sup>5</sup> — To be used by a local union or a regional or statewide campaign with localized actions.

| Basic                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  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| <ul style="list-style-type: none"> <li>➤ Coordinated buttons in the worksite or armbands (cheaper option)</li> <li>➤ Hand out information at school events</li> <li>➤ Sign employee petitions</li> <li>➤ Coordinated visibility (clothing, union shirts, signs in cars or classrooms, etc.)</li> <li>➤ Basic education with members on bargaining process and unsettled issues via 10 minute meetings, smart and concise written communications, short videos, etc.</li> <li>➤ #RedforEd Days to repeat coordinated actions and use the color of red – national solidarity color for educators</li> <li>➤ Regular worksite meetings that are well publicized</li> <li>➤ Request financial information from employer or state on budget, management salaries and benefits, outside lawyers, etc.</li> <li>➤ Membership drive to build member density</li> <li>➤ One on one campaigns to assess member readiness and educate/agitate members to take action</li> <li>➤ Small member delegations to board meetings or legislative committees to speak to the outstanding issues</li> <li>➤ Phone bank members and other bargaining unit members to address questions and educate/agitate for solidarity</li> <li>➤ Power map board members or key regional or state leaders and community to understand their interests and pressure points</li> <li>➤ Coordinate member postcards or letters to targets (publish their contact information)</li> <li>➤ Use the #RedForEd hashtag</li> <li>➤ Encourage members to share photos of actions on their social media platforms</li> </ul> | <ul style="list-style-type: none"> <li>➤ Solidarity buttons in the community</li> <li>➤ Create songs about our issue</li> <li>➤ Informational picketing as large groups in public or at specific events with the employer such as bargaining or board meetings, including a “gauntlet” style layout where the employer must walk past members</li> <li>➤ Votes of no confidence in the employer/decision-maker</li> <li>➤ Votes of confidence in the union bargaining team</li> <li>➤ Phone bank and letters to community members and parents to educate/agitate around the issues</li> <li>➤ Phone bank and letters to fellow NEA members in area who do not work for the employer, other unions and ally organizations.</li> <li>➤ Flood board members home mailboxes with postcards – one per member with a unified message</li> <li>➤ Encourage community members to write messages to board members</li> <li>➤ ArtBuild</li> <li>➤ Picket sign creation</li> <li>➤ Hold more frequent press conferences and press worthy events (highly visible activities)</li> <li>➤ Create a community e-newsletter to send updates</li> <li>➤ Organize coffee klatches</li> <li>➤ Post lawn signs in the community</li> <li>➤ Place ads in the school athletic programs and parent newsletters</li> <li>➤ Keep track of the employer’s spending on anti-union activities, outside lawyers, etc. and make it public.</li> <li>➤ Go door to door with leaflets in the community</li> <li>➤ Consider a boycott of key businesses owned by board members or supporting management.</li> <li>➤ Larger delegations of members at board members</li> <li>➤ Organize building-based solidarity events such as walk-ins before work begins</li> <li>➤ Create a community petition and/or pledge cards</li> <li>➤ Create community flyers and share them at supportive businesses (on counter) or leaflet popular community events such as farmers’ markets, recycling centers, etc.</li> <li>➤ Launch social media channels and post regularly to update the community</li> <li>➤ Put floats in local parades sponsored by the union</li> <li>➤ Hold press conferences</li> <li>➤ Create shareable social media graphics</li> <li>➤ Leaflet large school events like athletic games</li> <li>➤ Set up informational booths at local events such as fairs, farmers markets, etc. (“truth booths”)</li> <li>➤ Launch a landing page website</li> <li>➤ Meet with community organizations with an interest in students</li> <li>➤ Encourage other unions in the area to picket and act in solidarity</li> <li>➤ Consider work-to-rule tactics that impact management, but not students. These tactics include leaving or arriving at work when the day begins, resigning from voluntary committees, passive participation in faculty/staff meetings, etc.</li> </ul> | <ul style="list-style-type: none"> <li>➤ Large community or regional or state rallies</li> <li>➤ Organize and participate in parades</li> <li>➤ Organize a speakers’ bureau to go to community events</li> <li>➤ Marches on the employer/decision makers</li> <li>➤ Occupying a decision-maker meeting</li> <li>➤ Member and community delegations to speak at board meetings</li> <li>➤ Show collective resistance at staff meetings through passive participation</li> <li>➤ Pack up personal property from classrooms and offices</li> <li>➤ Picket board members’ houses/work</li> <li>➤ Organize coordinated walk-ins on the same day across a region</li> <li>➤ Banner drops</li> <li>➤ Civil disobedience (be sure to consult with your union’s legal counsel)</li> <li>➤ Take over board meetings</li> <li>➤ Hold “sleep ins” during bargaining sessions</li> <li>➤ Hold large membership rally prior to school board meeting, then pack the room</li> <li>➤ Attend critical bargaining meetings such as mediation or fact finding hearings and make sure board members see/hear us</li> <li>➤ Find and open a strike HQ</li> <li>➤ Hold a strike informational meeting for potential striking unit and other employees potentially impacted by a strike</li> <li>➤ Train picket captains</li> <li>➤ Ask athletic coaches to suspend games and work if there is a strike</li> <li>➤ Reach out to area colleges to ask student teachers not to come to work if there is a strike</li> <li>➤ Phonebank area substitutes to ask them not to take work at the school in the event of a strike</li> <li>➤ Hold a strike authorization vote</li> <li>➤ Hold community forums in-person or virtual town halls</li> <li>➤ Hold neighborhood based meetings with parents and concerned community members</li> <li>➤ Translate community outreach materials and go to communities with translators to meet with non-English speaking communities</li> <li>➤ Work with community organizations to develop proactive plans to support vulnerable students in the event of a strike</li> <li>➤ Consider a Facebook live to update the community on actions.</li> </ul> |

<sup>5</sup> See Tactics Manual WEAC.doc in resource section.

When planning more complicated or involved tactics, make sure to do our homework and get enough members involved to handle the logistics. Staff can help, but it creates more member ownership over the larger campaign when members can take a central planning role. Here are some **helpful tips**:

- ➔ **Rallies and Parades<sup>6</sup>.** Research location options (outdoor and indoor), rental costs, speaker systems, etc. well in advance. What are the local ordinances for marches and picketing (permits), contact information for police, best locations for high visibility? For larger scaled efforts, do we need shuttles, a parking plan, logistical support for bathrooms, water, food?
- ➔ **Target's Homes and Places of Work.** For actions at decision-makers' houses or places of employment, what type of tactic fits? What are your members' comfort levels? Consider the size and place of the location. How many members would be effective?
- ➔ **Pickets or High Visibility Events.** Make sure we use the schools and university as a strategic location, to make sure people know this is an education-based issue and then expand out. This includes early informational pickets before a strike date, meeting locations (when possible), and pickets and actions during the strike. For higher education strikes, a campus can have multiple entrances and buildings so determine the best central location possible on campus for any pickets or public events.
- ➔ **Low Turnout.** Be ready to modify our plan if member turn out appears to lower than expected or larger than expected. Do we need a different location? A different approach?
- ➔ **Weather.** Be ready for all types of weather. Generally, weather should not change our plans unless it is an emergency or unsafe. Marching in the rain or snow, standing on informational picket lines, and showing up no matter what builds a stronger message on how committed members are to the issues.
- ➔ **Social Media and Documentation.** Use social media to document our tactics and promote key events and build followers. Document our actions by taking high quality photos and video to make our own media and help build for the next action in the plan.
- ➔ **Dud Tactics.** Don't expect every tactic and action to be successful, especially if this is the first organizing campaign. We learn and adapt to fight another day.
- ➔ **Coordination and Approvals.** Make sure the crisis committee, local or state leaders and staff approve and are on board with every major tactic and action before it takes place. Stay coordinated and work towards consensus on what tactics to try.

To pull together tactical planning, timelines and committee assignments, consider using the Gantt Chart<sup>7</sup> used by Michigan Education Association for big picture campaign planning. This high-level planning tool gives committees an overview of major parts of a timeline, large tasks and assignments. To track more detailed weekly and daily planning use a calendar or weekly design layout.

The Gantt Chart is a cross between a bar graph and a timeline. It is an invaluable tool for organizing the timeline. It displays when certain activities start and end, and which committee is responsible for each. The chart uses color to give the committee an instant snapshot of this most important *who/what/when* of crisis efforts. It allows the committee chair to monitor progress, keep track of what others are doing, and to make sure that everything is moving according to the plan. The Gantt Chart is set up by simply: a) assigning each activity to a sub-committee, b) deciding where and when it fits into the plan and c) putting the activity on the chart. Please remember that this chart is a living timeline that can be changed by the committee to add or delete activities, or to adjust timelines. However, it should be noted that only the committee has this authority in coordination with local governance and staff to amend it.

<sup>6</sup> See the Rally Logistics Checklist.docx.

<sup>7</sup> See a complete Gantt Chart Example MEA.docx in the resource section.



The following is an example of the format for a Gantt Chart:

| Timeline   |       |      |      |      |      |      |      |      |     |      |      |      |
|------------|-------|------|------|------|------|------|------|------|-----|------|------|------|
| Activities | Sept. | Oct. | Nov. | Dec. | Jan. | Feb. | Mar. | Apr. | May | June | July | Aug. |
| Activity   |       |      |      |      |      |      |      |      |     |      |      |      |
| Activity   |       |      |      |      |      |      |      |      |     |      |      |      |
| Activity   |       |      |      |      |      |      |      |      |     |      |      |      |
| Activity   |       |      |      |      |      |      |      |      |     |      |      |      |
| Activity   |       |      |      |      |      |      |      |      |     |      |      |      |
| Activity   |       |      |      |      |      |      |      |      |     |      |      |      |
| Activity   |       |      |      |      |      |      |      |      |     |      |      |      |
| Activity   |       |      |      |      |      |      |      |      |     |      |      |      |

| Legend of Primary Responsibilities: |             |             |             |             |             |             |
|-------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Committee 1                         | Committee 2 | Committee 3 | Committee 4 | Committee 5 | Committee 6 | Committee 7 |
|                                     |             |             |             |             |             |             |



Here's a sample **strike timeline** designed within a 6–8 week build up to the strike:

| TIMELINE       | TACTIC                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | ROLE/ASSIGNMENT                                                                                                                                                                                                                                                                                 |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PRE-ASSESSMENT | <ul style="list-style-type: none"> <li>➤ Conduct a pre-assessment of the local union well before a crisis committee is formed.</li> <li>➤ Form an organizing committee before the strike build up to allow internal capacity building.</li> <li>➤ Identify available staff to support strike build up.</li> </ul>                                                                                                                                                                                                                                           | <ul style="list-style-type: none"> <li>➤ Staff</li> <li>➤ Local President/Staff</li> <li>➤ Staff/Field Manager</li> </ul>                                                                                                                                                                       |
| WEEK 1         | <ul style="list-style-type: none"> <li>➤ School Board (or University Board of Trustees) Meeting with small member delegation to explain impact of core issues on educators.</li> <li>➤ Crisis committee forms crisis build up plan, populates it with critical dates in the calendar.</li> </ul>                                                                                                                                                                                                                                                            | <ul style="list-style-type: none"> <li>➤ Crisis Committee</li> <li>➤ Crisis Committee</li> </ul>                                                                                                                                                                                                |
| WEEK 2         | <ul style="list-style-type: none"> <li>➤ Train communications team and refine the message; prep spokesperson.</li> <li>➤ Launch social media (ongoing) and plan press releases and conferences in line with key actions on timeline.</li> <li>➤ Organize consistent weekly 10-minute meeting structure for duration of build up with concise information and “asks” for members.</li> <li>➤ Launch a visibility effort — buttons or t-shirts.</li> </ul>                                                                                                    | <ul style="list-style-type: none"> <li>➤ Communications Staff and Crisis Team</li> <li>➤ Communications Liaisons</li> <li>➤ Communications Liaisons</li> <li>➤ Crisis Committee</li> </ul>                                                                                                      |
| WEEK 3         | <ul style="list-style-type: none"> <li>➤ Train community outreach team.</li> <li>➤ Identify potential community allies and begin outreach and meetings (small and large meetings).</li> </ul>                                                                                                                                                                                                                                                                                                                                                               | <ul style="list-style-type: none"> <li>➤ Staff Organizer</li> <li>➤ Crisis Community Outreach Liaison and Staff</li> </ul>                                                                                                                                                                      |
| WEEK 4         | <ul style="list-style-type: none"> <li>➤ School Board Meeting with full membership in attendance.</li> <li>➤ Train strike HQ coordinator and relevant staff.</li> <li>➤ Create picket signs or ArtBuild.</li> <li>➤ Continue to hold community meetings and go to neighborhoods to engage parents.</li> <li>➤ Phone bank parents and hold one-on-one conversations.</li> </ul>                                                                                                                                                                              | <ul style="list-style-type: none"> <li>➤ Crisis Committee</li> <li>➤ Staff Organizer</li> <li>➤ Crisis Committee</li> <li>➤ Crisis Community Outreach Liaisons</li> <li>➤ Crisis Committee and Community Outreach Liaisons</li> </ul>                                                           |
| WEEK 5         | <ul style="list-style-type: none"> <li>➤ Issuance of fact-finding report (if relevant) and member action at fact-finding hearing.</li> <li>➤ Strike Informational Meeting (with teacher striking unit and ESP for solidarity purposes).</li> <li>➤ Hold informational pickets .</li> <li>➤ Continue to hold community meetings and go to neighborhoods to engage parents. Begin to organize contingency plans for vulnerable families and students in the event of a strike.</li> <li>➤ Reach out to area unions and ask for solidarity actions.</li> </ul> | <ul style="list-style-type: none"> <li>➤ UniServ Director, Bargaining Team and Crisis Committee</li> <li>➤ Crisis Committee, Staff, Attorney</li> <li>➤ Crisis Committee</li> <li>➤ Crisis Committee and Community Outreach Liaisons</li> <li>➤ Solidarity Liaisons</li> </ul>                  |
| WEEK 6         | <ul style="list-style-type: none"> <li>➤ Open Strike HQ.</li> <li>➤ Set up “instant” internal communication tools for peer-to-peer texting and alerts (ex: Hustle).</li> <li>➤ Train Picket Captains &amp; General(s).</li> <li>➤ Hold virtual town hall meeting with parents and/or in-person community event(s).</li> <li>➤ Meet with athletic and extracurricular staff to ask for solidarity.</li> <li>➤ Hold informational pickets.</li> <li>➤ Do door-to-door leafleting in community.</li> </ul>                                                     | <ul style="list-style-type: none"> <li>➤ Strike HQ Manager and Staff</li> <li>➤ Communications Liaisons</li> <li>➤ Staff Organizer</li> <li>➤ Crisis Committee</li> <li>➤ Crisis Committee</li> <li>➤ President/Crisis Chair</li> <li>➤ Crisis Committee and Communications Liaisons</li> </ul> |
| WEEK 7         | <ul style="list-style-type: none"> <li>➤ Strike authorization membership meeting.</li> <li>➤ Call Substitutes and notify student teacher programs in area.</li> <li>➤ Strike loan application office hours (if applicable).</li> </ul>                                                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"> <li>➤ President, Crisis Committee, Staff</li> <li>➤ Crisis Committee</li> <li>➤ Crisis Committee Staff</li> </ul>                                                                                                                                            |
| WEEK 8         | <ul style="list-style-type: none"> <li>➤ School Board (or University Board of Trustees) Meeting with full membership and community members in attendance.</li> <li>➤ Day Before—clear classroom, turn in keys</li> <li>➤ First Day of Strike.</li> </ul>                                                                                                                                                                                                                                                                                                    | <ul style="list-style-type: none"> <li>➤ Crisis Committee and Community Liaisons</li> <li>➤ Crisis committee</li> <li>➤ EVERYONE</li> </ul>                                                                                                                                                     |

## Internal Communications

Remember to use secure union-operated forms of communication and make sure to **increase the frequency**, be concise and direct with the issues including rebutting assertions by the opposition that may cloud members' understanding of what is at stake and how they are being treated. In every communication always make it clear what is needed in terms of action by the members. Keep in mind, the goal of our internal communication is to promote solidarity, clarity and coordination. Internal communications are not for responding and rebuking each and every point put out by the opposition. When in doubt, keep it short and sweet.

At this point in the strike build up, make the communication **predictable** either through consistent days of the week to hold 10-minute meetings, flyers printed on the same bright colored paper, daily Facebook live updates from the President, daily email at 5 p.m. with a quick recap of the day and plan for tomorrow, daily press release, and/or other regular methods. Use a texting platform to communicate important details and actionable items. Leaders get the minute details and members get the basics they need to be informed and to act. For regional or statewide action, we must rely on a wider network of leaders to share information and mobilize members so incorporate this into the timing of our communications.

Create a policy for a communications approval timeline. Often when an opportunity arises for us to take advantage of a moment and advance the campaign, it is time sensitive. When we must wait for multiple stakeholders to offer edits and approvals, we can miss our opportunity to make a meaningful impact. Make sure the communications liaisons are empowered to draft, seek feedback and go public with information as soon as possible. Having a pre-determined policy allows this process to work smoothly and minimize frustration and lost opportunities.

Members should not be expected to blindly support a strike build up. We must communicate and reflect back matters that resonate and matter to them while also showing a path forward through necessary action. Information sharing without agitation and polarizing work to develop members' analysis creates a difficult organizing environment. Keep this in mind when building our communications strategy.





## **Local Union Finances**

Before a campaign gets too far along in planning, the local treasurer and staff should review the state of the local union's finances. If a campaign is moving towards a strike, a budget should be created since a strike, even the buildup, will require money. A budget reveals what is needed to support the strike, creates common understanding of how to responsibly steward the money of the union among all the leaders, and controls and organizes the spending. It can help inform the crisis committee on tactics that may be too costly (e.g. paid media buys) and/or require ally organizations to help fund. Depending on the state, the state affiliate may also have additional crisis assistance resources.

Here are some helpful **dos and don'ts tips** to remember in planning:

- ✓ **DO** ask for donations to rent spaces, secure food for large events, sign making supplies, etc.
- ✓ **DO** research different options if the union needs to cover the cost.
- ✓ **DON'T** Rent a fancy hotel banquet hall for an indoor rally.
- ✓ **DO** use a church basement. It is often cheaper and fits the same number of people.
- ✓ **DO** See if the state affiliate can handle some of the printing costs or leverage relationship it has with certain vendors to reduce costs.
- ✓ **DO** take on costs to help local leaders do the work. For example, sometimes ESP members do not own cell phone but need this level of technology to be able to lead campaigns. The union should set up temporary phones to assist these folks.
- ✓ **DO** shop around for affordable buttons, t-shirts or other visibility tools, but also try to support union print shops and/or local businesses whenever possible.
- ✓ **DON'T** purchase large media buys such as an ad or radio or tv spot. These tend to be very expensive and not nearly effective as direct community conversations.
- ✓ **DO** ask for donations of furniture, office equipment, and items like space heaters or fans versus renting or buying the items for strike headquarters.
- ✓ **DO** plan to ask for supporters in the community or other unions to help purchase food for the picket lines each day rather than purchasing food each day with local union funds.
- ✓ **DO** plan to ask members to bring their own lunch and snacks just like a regular workday to minimize expense for larger memberships.
- ✓ **DO** offer water, coffee, and basic provisions to keep morale high and to take good care of our members.
- ✓ **DO** encourage community allies to set up donation fundraising drives to support members who may face economic hardship in the event of lost wages or insurance during a strike.
- ✓ **DON'T** oversee a fundraising drive as the union via GoFundMe or other sources for such purposes given the legal risks and challenges of administering a fund for individual members.
- ✓ **DO** use a state affiliate strike loan fund if available to all members.
- ✓ **DO** explore setting up a donation system for allies, other unions and community organizations that go to general strike operations (strike HQ rent, food for members, etc.) and have the local treasurer and crisis committee manage these funds in line with the established budget.
- ✓ **DO** determine who will reimburse other local members or staff for mileage, flights and hotel stays if they are invited to come and support the buildup/strike.
- ✓ **DO** remember most legal costs related to fact finding, mediation and other legal steps in the bargaining process will be in addition to any organizing expenses.
- ✓ **DO** see more advice under individual member finances section.

## **SAMPLE LOCAL CRISIS BUDGET — EXAMPLE**

Amounts vary widely based on location in the country, availability of local or regional resources such as field offices and many other factors. This example helps to identify common expenditures. Work with local leaders to research local expenses ahead of launching major parts of the campaign to make sure we are spending resources in a smart and effective way. Amounts are specifically left blank to allow for regional variations.

### **Income**

- \$\_\_\_\_\_ Local union crisis fund & other sources
- \$\_\_\_\_\_ State affiliate crisis assistance fund
- \$\_\_\_\_\_ Supplies: paper, pens, office equipment (in kind from state affiliate)
- \$\_\_\_\_\_ Phone banking and texting system software (in kind from state affiliate)
- \$\_\_\_\_\_ **TOTAL**

### **Proposed Expenditures**

- \$\_\_\_\_\_ Crisis headquarters rental (one month)
- \$\_\_\_\_\_ Utilities (heat, electric, internet)
- \$\_\_\_\_\_ Meeting hall rentals (during strike for meetings)
- \$\_\_\_\_\_ Temporary Cell Phone Lines (one for HQ, and more for leaders without phones)
- \$\_\_\_\_\_ Supplies: stamps, posters, markers, personalized picket signs, etc.
- \$\_\_\_\_\_ Food for core crisis leaders during picket captain meetings, etc.
- \$\_\_\_\_\_ ArtBuild: consultation with local artist and supplies.
- \$\_\_\_\_\_ Daily Refreshments: coffee, water, snacks, etc. for pickets
- \$\_\_\_\_\_ Printing expenses: fliers for community (before strike), copies etc.
- \$\_\_\_\_\_ Media expenses: Social media, website hosting
- \$\_\_\_\_\_ Ads in local papers or school athletic programs, etc.
- \$\_\_\_\_\_ Injunction or court fees related to legal actions
- \$\_\_\_\_\_ Miscellaneous
- \$\_\_\_\_\_ **TOTAL EXPENDITURES**

## **Membership — Working with Potential Members**

Strike build ups are a great time to illustrate the importance and relevancy of the union to potential members. People join organizations because of a sense of belonging, shared values and relevancy to their professional lives. One of the most compelling ways to recruit someone to join is to show them the value of standing together on behalf of our profession by organizing to change the school or university or statewide education system for the better.



Campaigns are also a great time to involve potential members in activities and actions that build union power and strengthen the contract or statewide salary/benefits policies that benefits all employees in the unit. Involving more employees regardless of union membership status shows strength and unity to the employer. Be clear with potential members about the distinction between members and non-members in a strike build up. Members get to decide the course of action, vote (including strike vote), serve in leadership roles and, where relevant, gain access to state strike loan funds. Potential members can participate in activities but cannot be part of deciding what or how the union will act. Invite potential members to be part of the process and to gain a voice in the decision-making process. However, set a clear deadline for when a potential member can join. We want to encourage potential members to join based on the issues, not based on easy access to a strike loan.

Explore available programs to incentivize joining such as the NEA's Early Enrollment for first-time members with no prior membership history. Work with the state affiliate to offer pro-rated state dues for any potential member who joins during the strike build up. Local unions control their dues and can explore pro-rating dues or other ways to ease the cost of dues to encourage membership.

## **Legal Assistance**

Every state has a different sized legal department and process for advising local unions on the legal aspects of strikes. Start by notifying the general counsel of a potential strike as soon as possible so legal counsel can assist the buildup campaign and available for all relevant membership meetings and to review time-sensitive legal issues such as potential unfair labor practices (ULPs), potential injunctions by the employer, or other legal actions threatened by the employer to intimidate members from striking. Employers do not always engage in unfair labor practices but is important to conduct a thorough review because in some states a strike with an active unfair labor practice charge can trigger further legal protections for striking employees.

Consider using this checklist, modified from the Illinois Education Association's Strike Handbook, of pre-strike legal and bargaining items to help assess the situation:

### **A. Bad Faith Bargaining Review**

To determine whether bad faith bargaining has occurred a fact-intensive inquiry should be done based on the "totality of the circumstances."

#### **1. Pre-Strike Bargaining Review**

- a. Prior to the start of any strike, review the employer's "totality of circumstances" conduct to determine whether it has engaged in bad faith bargaining conduct by:
  - i. refusing to meet at reasonable times and places.
  - ii. reneging or withdrawing from tentative agreements; and/or,
  - iii. unilaterally implementing changes in wages, hours and terms and conditions of employment without a valid impasse.
- b. Review the Bargaining Questionnaire and bring any relevant information to the General Counsel to facilitate assessment of bad faith bargaining.
- c. Create a bargaining timeline.
- d. Contact the General Counsel for your geographic area to review the facts.

### **B. Related Legal Matters**

#### **1. Pre-Strike Work with Legal Services Department**



- a. Share relevant background information.
- b. Notify the employer of the union's Attorney of Record.
- c. Discuss and evaluate with the Attorney of Record the course of bargaining, as set forth above.
- d. Immediately refer all matters concerning possible unfair labor practice charges against the union to the Attorney of Record.
- e. Double check that the union has fully complied with state law requirements — that is strike requirements and notices.

### C. Investigate the Employer's Pre-strike Preparation

1. Review the employer's steps in preparing for a strike to monitor and help determine whether the employer is engaging in unlawful conduct:
  - a. advertising and organizing to hire strike replacements;
  - b. adjusting employee benefits for the purpose of rewarding scabs or strike replacements;
  - c. communications with employees about a strike;
  - d. communications with parents and community about a strike;
  - e. communications with regular substitute employees about a strike;
  - f. advertisements or comments in newspapers about a strike; and,

Be sure to brief the lawyer on the campaign and coordinate how staff will address questions before you attend any membership meeting, so staff do not surprise each other with inconsistent answers or advice. Walk through helpful documents like strike FAQs that address a range of issues on insurance coverage, COBRA, being fired, and replacement workers.

For statewide actions or local actions in states without clear rules on the right to strike or if a state clearly prohibits striking, create an early strategy on how to advise members of the law and prepare clear communications on what is sanctioned activity by the state affiliate or not. We must advise on the technical aspects of the law, but also allow local unions to act as a democratic and independent organization once they receive legal counsel.



## External Operations

### **Communications Training<sup>8</sup>**

Organizing committee members tasked with communications should focus on two main things: effective and consistent communication to members and external communications to the community and media. Train members on the best practices related to internal communications, including sharing effective written templates (email and printed versions), 10-minute meeting agendas, and social media posting strategies. When dealing with the media it's important to practice. People who could potentially speak to the media (picket captains) throughout the work action should have additional training.



Bring in national or state communications staff to help local leaders develop and refine their message and media strategy and prepare your team speak to the media. In statewide actions one strategy is to coordinate virtual trainings to have more local voices in local media outlets. Statewide coordinated training allows us to have message discipline and consistency. If you have capacity, consider expanding the media training to include allies from the community who will amplify our core message such as parents, community members, and college students involved in a higher education campaign.

Media training should include tips on staying on message, pivoting within a line of questioning by a reporter to return to the message, availability and timing on responding to media requests, best practices for being on camera or recorded

audio (radio), and developing variations on the message as things developed during the buildup and strike. Encourage members to practice before speaking to the media. Also, remember, we want the local union to become a trusted source of information so do not spread rumors and do not allow the employer or opposition spokesperson to become that trusted source.

### **External Messaging<sup>9</sup>**

Stay steady on core message and frame. In addition to developing our message, be ready to stay on message when the employer or opposition spokesperson attempts to define the strike, distract the focus onto larger forces, such as lack of state funding, and demonize the educators through their own media strategy and messaging. Remember the best message defines the issues, focuses on students and is logical to members and the public. Consider these points when defining the issues:

<sup>8</sup> See Media Relations Tips.docs in the resource section.

<sup>9</sup> See Race Class Narrative Checklist: [https://m5b.422.myftpupload.com/wp-content/uploads/2020/02/RCNA\\_Checklist.pdf](https://m5b.422.myftpupload.com/wp-content/uploads/2020/02/RCNA_Checklist.pdf)

Try to also answer these questions:

1. Why is this campaign (issues) so important?
2. What are the major differences between the union and employer (or the state) on the issues?
3. Who is our audience and what will resonate?

Here is a checklist for external messaging work:

- ☐ **Fact Sheet.** Prepare a campaign fact sheet including the current bargaining history, key issues, employer contact information, union leader names and contact information, pertinent information about the school district or university, and other information. Often in rural areas or regions without frequent labor conflicts, reporters will need to know basic information about the schools, the issues (ex: what are current class sizes and why does that matter?), bargaining terms and definitions, contract expiration dates, and information about the union.
- ☐ **Create a Media Contact List.** Include contact information (phone, email, etc.), news deadlines and advertising deadlines for radio, TV, newspapers, wire services as well as local reporters. Ideally this list is maintained by the state affiliate, but local outlets may need to be added.
- ☐ **Social Media.** Develop social media pages and a strategy for regular, strategic posts.
- ☐ **Webpage.** Create a webpage landing page where community members and the media can easily find up-to-date information on bargaining proposals, community updates and other important items as the campaign unfolds.
- ☐ **Local and State Education Reporters.** If it has not been done so already, reach out to the local and statewide education reporters as early as possible to provide background on the campaign and what is at stake.
- ☐ **Self-Documentation.** Appoint members to photo document and video our activities to create your own media throughout the campaign. Use social media to amplify our own stories.
- ☐ **Press Release.** Create a press release template<sup>10</sup> with spokesperson contact information.
- ☐ **Media Contact Schedule.** Create a schedule of good times to notify the media of activities:
  - ✓ Critical school board or university board of trustee or legislative committee meetings when issues related to the campaign are up for debate or decision
  - ✓ School board, legislative or gubernatorial candidate campaign events
  - ✓ Budget meetings (school or university)
  - ✓ Opening of local bargaining
  - ✓ Updates after important local bargaining sessions
  - ✓ Local impasse and mediation
  - ✓ Updates on key statewide legislative activities or votes
  - ✓ Before a strike vote
  - ✓ After a strike vote
- ☐ **Contact State Communications Staff.** Make use of the state affiliate communications staff to help with training and drafting communications to members, the community and the media.

<sup>10</sup> See several press release examples in the resource section: AEA Statewide Press Release Example.doc, Aurora, CO Press Release re Community Schools Example.doc, Bellevue College Press Release.docx, CEA Pueblo Press Release Example.docx, CEA Pueblo Press Release Strike Announcement Example.docx, Centralia, and CO No Confidence Press Release Example.docx.



## Community Outreach<sup>11</sup>

Identify ally organizations and parent groups, and understand what allies hold the most influence over decision-makers. Further develop these relationships by inviting them to critical actions, updating them on developments in real-time, and asking them to help expand our reach to more parts of the community. If community outreach work was not a major focus of earlier stages of the campaign, make sure to assign members (or local leaders in a statewide effort) to this important work as quickly as possible.



### TIP:

Use Action Network, Every Action, or other data collection platforms when creating online petitions and event RSVP so you can collect data on community supporters. Also see the UTLA Parent Support List Building Sign Up List in the resource section.

Continually build our community ally lists by asking members to suggest names of potential supporters or critical contacts and then asking those allies for additional names within their networks. Be prepared for community interest to immediately multiply as soon as the word strike is shared and be ready to harness the heightened level of interest to help bring about a settlement before the strike by sharing the union's message and position.

Add tactics to our campaign plan to help deepen our community connections. Many of these tactics also work for statewide campaigns and should be planned in a coordinated, decentralized way in local communities by local unions.

- ✓ Organize community phone banks to targeted lists such as other union members in the area, parents, recent alumni, ally organization members' lists, faith communities, and community VIPs/leaders. This is the most cost-effective and persuasive way to build support for our strike compared to costly media buys.
- ✓ Send letters and updates to community members that are concise, factual and illustrate the urgency of the problem.
- ✓ Use email programs to directly reach community members and allow us to engage members with online platforms that link petitions or event RSVP programs to deepen engagement.
- ✓ Develop our social media channels and encourage community members to signal boost our posts and explore setting up ally pages to create more grassroots support for the campaign.
- ✓ Do literature door-to-door "drops" to get information directly to community members..
- ✓ For K-12 build ups, gather parent support through pledge cards<sup>12</sup> collected at schools before or after hours, at PTO meetings or other parent gatherings.
- ✓ For higher ed build ups, gather student support through pledge cards, petitions and other online means. Also make sure to bring in other unions on campus who may represent different groups of employees.
- ✓ Track community contacts, individual names, contact information and archive it after the buildup to use in the future.
- ✓ Track messages of support and acts of solidarity and share it with members as the buildup intensifies. This will build morale and resolve.
- ✓ Share real-time updates with community members, including timely information<sup>13</sup> the day before the strike.

<sup>11</sup> See examples: Coalition Building Tips.docx, UTLA Community Support Card.pdf, Parent Support Card.docx, Statewide Walkout Community Canvass Script Sample.docx, Strike Solidarity request Email Samples.docx, Statewide Walkout Talking Points Sample AEA.docx, Community Organizing Training Manual MEA.docx, and Community Phonebank Script Sample VTNEA.docx.

<sup>12</sup> See UTLA Community Support Card.pdf in the resource section and Action Network.

<sup>13</sup> See Strike Solidarity request Email Samples.docx in the resource section for how to inform community allies of day one strike activities and ways to support the effort.

## Planning for the Strike Decision

For local strikes, the following steps help to outline important pieces to put in place before we call a strike authorization vote. In the case of a regional or statewide strike, these pieces should be coordinated from the state crisis committee level and implemented on the local level by local leaders.

### **Bargaining Plan Before Recommending a Strike**

In the final bargaining sessions before the strike buildup begins, make sure to push more items forward to maintain a diverse set of issues that still maintain common good goals<sup>14</sup> and not just compensation issues. Even if the employer refuses to bargain common good items, keep them alive — because when power shifts in a strike, opportunity can open to gain ground in untraditional bargaining topics. For example, in the UTLA strike, they were able to bring common good bargaining items back into the bargaining room once on strike that received no attention prior to the strike.

Before going on strike establish an exit bargaining strategy — what it takes to settle before we go out on strike. What is non-negotiable? How will we make decisions when the strike continues past a few days? When will we be willing to contact the employer to bargain? How will we handle member anxiety and/or outrage during a strike and/or the eventual tentative agreement?

Consider aligning bargaining timelines with other bargaining units also engaged in bargaining? It can build unit and power to strategically work together and set the same strike date. Do be careful about delaying one bargaining unit's action if the timelines are too far apart or one group is hesitant to work with the other.

### **Statewide Plan Before Recommending a Walk-out**

Legislatively it can be hard to plan what steps should be taken before calling a statewide strike given the unpredictable nature and timing of the legislative process. In Arizona, the state affiliate made sure to send a clear request to the Governor to meet before the budget process concluded to negotiate terms. The request came from AEA and the grassroots educator organization, Arizona Educators United. The Governor did not respond, but the union used this effort to further educate and mobilize educators and their community allies by saying they tried everything before walking out.

Local leaders should also communicate with local Superintendents before a statewide strike to give local administrators an opportunity to decide if they will close schools or not in the event of a statewide walk-out. Arizona asked local presidents to do this and also to ask specific questions given the unprecedented nature of the job action in the state. They asked questions such as: Can certified staff use sick or leave time during the action? What would happen if schools are closed and the school year gets extended? How



<sup>14</sup> See Bargaining for the Common Good Proposal Examples.pdf in Chapter 1 of the resource section.

will school sponsored events, testing, and other events be handled? How can the district and the local union and community partners work together to make students are fed during the action? Early outreach also allowed Superintendents time to be in touch with parents. In the end, all but two schools in the state closed during the 2018 walk-outs.

### **Local or Statewide Research Health Insurance Coverage**

Before calling a local strike vote, research the employer's health insurance carrier and how premium payments are made. For statewide efforts, collect information on all the major insurance carriers for school districts and their premium payment schedules. Then specifically prepare educators with relevant

information<sup>15</sup> about their health insurance coverage and COBRA rights if the employer ends coverage and/or requires premium payments while withholding salary/wages. Hold in person meetings and share clear communications early on to assuage fears. Insurance coverage is one of the most common sticking points for a member's decision to strike or not. Some states protect insurance coverage by state law (Washington), but it varies state to state. No matter what, assure members the state affiliate will take steps necessary to protect members' interests. When conducting local or statewide research, contact the insurance carrier and obtain clear, written answers should be obtained on such items as:



<sup>15</sup> See ESP Strike FAQ Sample VTNEA.docx, Teacher Strike FAQ Samples.docx, and Health Insurance and Benefits Guide IEA.docx as examples in the resource section.



- ✓ *What is the deadline for premium payments each month?*
- ✓ *When does the employer make the premium payment and what time period does it cover?*  
*Many employers pay at the end of the month for the next month. This is useful information when planning what day to begin a strike or not.*
- ✓ *How and where should payments be made?*
- ✓ *What happens if premiums are not paid on time?*
- ✓ *What are the premium amounts for different-sized families?*
- ✓ *What happens to deductibles and/or co-insurance levels if premiums are not paid?*
- ✓ *Can an employee re-enroll on a plan if coverage is dropped for a period of time?*
- ✓ *How can a member activate their COBRA rights?*

### **Prepare Member for Potential Wage Loss**

Prepare members as early as possible for possible loss of wages in the event of a strike. The earlier members understand the risk and prepare, the more likely the chances of removing the fear of economic insecurity, allowing members to ultimately decide out of principle versus economics. Some states offer strike loans to members, but it is ideal for members to prepare their own individual economic security plan to build their confidence and resolve that a strike is doable. See if the state affiliate can contact local credit unions and banks to explore creating no to low interest loans for educators preparing to take a job action. Also see if these banks are willing to work out special, temporary mortgage or pre-existing loan extended payment plans for members with accounts with local financial institutions. This creates another resource for members while also alerting financial institutions in the area that the threat is real. Finally, review the state's laws because some employers cannot withhold pay for salaried employees without taking certain steps. For ESP related strikes, discuss and plan on how to handle the prospect of members taking on second jobs during a work stoppage if it becomes economically necessary for individual members with no other option.

Contact NEA Member Benefits so you can inform members of strike related provisions in Member Benefit programs. Be sure to consult with your attorney because some state laws hold that employers cannot withhold pay for salaried employees without taking certain steps. For ESP related strikes, discuss and plan ahead on how to handle the prospect of members taking on second jobs during a work stoppage if it becomes economically necessary for individual members with no other option.

**Here are proactive tips from the UTLA member strike handbook for preparing for the potential financial impact of a strike:**

- ✓ *Prepare a complete household budget*
- ✓ *List assets*
- ✓ *Set priorities for your expenses*
- ✓ *Make a complete list of creditors<sup>16</sup>*
- ✓ *Notify your creditors before getting behind<sup>17</sup>*
- ✓ *Pay what you can*
- ✓ *Stay in touch with creditors*
- ✓ *Stop credit purchases*

<sup>16</sup> See Creditors Letter Sample.docx, UTLA Member Strike Handbook.pdf, and Oakland EA Member Strike Tool.pdf in the resource section.

<sup>17</sup> See Creditors Letter Sample.docx in resource section.

- ✓ *Reduce household expenses*
- ✓ *Check-into other financial resources, such as loans from local banks.*<sup>18</sup>
- ✓ *Explore how to reduce student loans.*<sup>19</sup>

## **Prepare for How to Handle Picket Line Crossers**

As picket captains begin to assess members and potential members in their workplaces and their willingness to participate and honor picket lines, create a plan for how to prevent people from crossing the picket lines. Emphasize that members and non-members do not need to support the strike, vote to strike or even participate, but it hurts long-term relationships to cross the picket lines. Plus, it is highly likely schools will remain closed if enough educators are on strike, meaning there will be no students to teach or support. For ESP strikes, the closure of schools is more unpredictable. In this case, emphasize on the long-term relationship impact on colleagues. If people stick together and honor picket lines, it will help to make any potential strike be shorter versus longer.

When the strike begins, picket captains should take daily attendance and contact anyone not on the line. This approach allows members with relationships with picket line crossers to make contact and persuade members to honor the line. If an employee crosses a picket line once on strike, remind the employee of any forfeited rights such as access to a union strike loan for taking such action. Empower local leaders to decide how to further respond within each worksite based on unique circumstances and/or ways to keep the peace during the strike. Fear can be a strong motivator and cause people to make the wrong decision, especially when worried about loss of wages or employer threats. In other cases, some people hate unions and will purposefully cross the line. Remember, employees not in the striking bargaining unit are NOT considered picket line crosses. They must report to work during a strike unless schools are closed, otherwise it is considered insubordination and could be a fired. Never threaten a picket line crosser.

## **Non-Tenure, Probationary Employees**<sup>20</sup>

Make sure to pay attention to probationary employees and non-tenure teachers who may be worried about losing their jobs if they strike. These employees can be extra vulnerable. Remind them they are not alone and if we all take action, it is much harder, if not impossible, for the employer to replace that many staff, teachers or faculty members. Hold special meetings with these employees to prepare them for the potential strike and cover their legal rights and how they can be supported during strike. Explore how to remove hurdles to them joining the union (can't afford dues). Pair them up with a more senior employee to help them navigate questions as they arise during the buildup.

## **Non-Citizen Considerations**

Check-in with non-citizen employees in the striking bargaining unit. Permanent residency visa holders should have the same labor rights under a labor dispute as citizens. Non-citizen employees should be offered more behind-the-scenes options to support the strike to avoid any legal retaliatory actions by the employer. Because immigration employment issues are constantly changing, consult with your attorney to specifically decide how best to protect non-citizen employees.

<sup>18</sup> See UTLA Member Strike Letter for Loans.pdf sample in the resource section.

<sup>19</sup> See [nea.org/studentdebt](http://nea.org/studentdebt)

<sup>20</sup> See Probationary Teacher and Strikes Fact Sheet Sample and New Member Talking Points on Strike in the resource section. Also share NEA's Student Debt Loan forgiveness program at [www.nea.org/studentdebt](http://www.nea.org/studentdebt).

## **Prepare Impacted Employees Not Walking Out<sup>21</sup>**

Proactively reach out and support employees who would be impacted by a walk-out. For example, ESP during a teacher strike and vice versa. In higher education, professional and clerical staff may be impacted by a faculty strike even if less directly than a K-12 strike situation. Hold informational meetings to share their legal rights, required actions during the strike based on their contract or being an at-will employee, and ways they can show solidarity even if they are directed to report to work. Ask these employees to be careful about not taking on work normally assigned to striking employees. If employees are unionized, being asked to do work outside their role could warrant a grievance. Other employees may be at-will, subcontractors, or not licensed or qualified to take on these additional assignments. In all cases, comply first and grieve and protest later. Ask non-striking employees to pay close attention to how schools or the university are operating without the striking employees and share useful information to help the strikers educate the community on what is happening that is not in the interest of students. Share legal ways employees can support strikers within the workplace and after work hours. If the relationship between staff and teachers/faculty is not cultivated early, distrust and lack of solidarity can easily develop and undermine efforts.

## **Strike Informational Meeting**

Hold informational meetings for employees at least three weeks before the action date. State staff should attend the meeting, especially the UniServ Director and assigned attorney to address legal questions. The goal is to be factual and assuage fears to empower members to decide on whether to walk-out based on principles and issues rather than economic or job security fears. In Arizona, for example, the state affiliate created a FAQ document on the legal information relevant to a walk-out and every local union made it available to local educators before voting on whether to walk or not.

## **Prepare Vulnerable Families and Students (K-12)**

When educators go on strike there is a huge impact on our community. Do not forget that when schools close all of our students are impacted. It is our job to make sure every student will have access to safe places to go and fresh food to eat throughout the strike. Take an active role in preparing for the impact on vulnerable students/families if there is no school (K-12) — explore issues of safety, food security/access, childcare for vulnerable families. Encourage members to see this struggle as their struggle because sadly some do not. Connect with families about the short-term sacrifice for the long-term vision and gains that the community-based issues involved in the campaign will win for the larger community. Shift the blame to management and explain that striking educators cannot participate in a system that abuses them and neglects student needs.

Have the community outreach people on the crisis committee to work with parents to organize solidarity childcare for families in need. Explore how the union can leverage community organizations to provide food for students in need. In Pueblo, CO the union worked with community partners to ensure that all students had somewhere safe to go during the strike including:

- ✓ opening local churches, synagogues, and community centers to students
- ✓ working with the city to offer free day passes to the recreation centers, museums, and the zoo, and
- ✓ partnering with the local Boys & Girls Club to offer day camps for students of all ages.

<sup>21</sup> See Teacher Strike FAQ for ESP Sample VTNEA.docx, and ESP Strike FAQ for Teacher Sample VTNEA.docx in the resource section.



Pueblo EA also reached out to local foodbanks to set up donation and pick up locations all around the city so that no one went hungry during the strike. The food bank was open to anybody, students, parents, even striking teachers came to get groceries during the strike. Every day Pueblo EA sent a press release out to local media with information about places to go and food to eat available to anyone during the strike. Striking educators made sure their community was taken care of and in return, the community took care of them by helping them win a fair contract.

Take into consideration concerns by parents of traditionally marginalized students in the school system (K-12) and students on university campuses who will be concerned about the loss of academic support during a strike. These concerns should be acknowledged given the significant structural barriers facing students marginalized in the education system and how a gap in academic instruction can negatively impact at-risk students.

### **Strike Authorization Vote**<sup>22</sup>

A strike vote can be intense, but also an empowering moment in a local union's existence. When run well and well planned, the meeting and vote can unify and ignite members to take action, especially for members who've never considered a strike before in their careers. However, when rushed or ill-timed, it can also collapse a campaign and weaken bargaining.

Tips from the 2018 Arizona #RedforEd walk-out authorization vote process include:

- ➔ **Pre-Assessment.** Conduct a pre-assessment at each worksite — either informally through picket captains conducting ongoing one-on-ones to get an accurate temperature read of members' sentiments or use a more formal assessment. Within the assessment, local leaders should ascertain what percentage of members will vote to authorize a strike as well as how many will respect the picket lines and not cross. Local leadership and staff should know the likely outcome of the vote before the meeting. In Arizona, local leaders were asked to continually assess the willingness of local educators to participate in a walk-out with early tactics leading up to their walk-out vote.
- ➔ **Meeting Site.** Find a location that allows privacy and ease for members to participate — easy parking, central location, and accessible. It is powerful to meet within a school or university building to be upfront with the employer on the state of things, but sometimes the employer can prevent the union from using the space. Churches, community centers, civic organizations, theaters, and hotel meeting facilities all work. Make sure the space has enough chairs, a PA system and technology needed to present information. Arrange for simultaneous translation if not all members are fluent in English.
- ➔ **Member Check-In System.** Organize a membership check-in system at the door of the meeting to keep the meeting organized and members-only. This also allows building representatives or picket captains to see their members one last time before the meeting to bolster morale. Consider asking members to sit by worksite to build morale, answer last minute questions and ease discomfort by nervous members. This allows picket captains to also easily determine attendance rates from their building and easily distribute ballots.
- ➔ **Media at the Meeting.** Non-members and media representatives should not be in room when members are discussing and voting. At the conclusion of the meeting, call a press conference to announce the results and ask members to stand behind the spokesperson. Be professional and accessible to the press to make sure the meeting is the top story. Make sure the communications staff person actively communicates with the press, handles explaining the rules of access to the meeting and logistical questions during the meeting so local leaders can focus on the task at hand — the vote. After the meeting, make sure to ask members to not speak to the press unless they've

<sup>22</sup> See Strike Vote Meeting Tips.docx in resource section and Statewide Walkout Ballot Sample from AEA.

been trained by the union and are familiar with the union's message. Generally, all media inquiries should go through the spokesperson.

- ➔ **Know the By-Law Rules.** Review the local union's by-laws to follow the necessary rules of order for the meeting and any specific clause related to strike votes. If a local union does not have a specific rule on strike votes, consider adding one after the campaign is over to clarify the process, including whether absentee ballots will be allowed and what the approval threshold should be. It is ill advisable to allow absentee balloting because it allows members to vote in isolation and fear versus coming together and benefit from hearing colleagues speak to the necessity to take a stand. Similarly, defining a higher threshold for a vote protects the union from acting if the vote is a slim majority. The strongest vote margins are 80% or higher of the total membership compared to a simple majority of those present. In Arizona, the state affiliate sent out voting instructions and procedures two weeks before the vote to create consistent process in every district. AEA created a #RedforEd hotline for local presidents to call and report the vote results. They also posted videos with voting instructions on the AEA and Arizona Educators' United Facebook page to increase knowledge and transparency on the voting process.
- ➔ **Allow other bargaining units to attend — if they are members.** If teachers are taking a strike vote, allow ESP members of the same union to attend but clarify they cannot vote. It encourages solidarity and a deeper understanding at what is at stake for their colleagues and perhaps themselves when they face their next bargaining cycle. Plus, when a call to action is made at the end of the meeting, members of the other bargaining unit hear the same requests in real-time. Building inclusivity also builds union power.
- ➔ **Meeting Notice<sup>23</sup> and Preparation.** Announce the meeting as required by the by-laws and with plenty of notice to members to attend. Make sure organizing committee members and picket captains organize their buildings so attendance is high and well represented throughout the district/university. Make sure members, the community, employer and media, know this meeting is to discuss a strike and/or take a strike vote.
- ➔ **Prepare two agendas.** The meeting should not take longer than one hour, leaving the majority of the hour for member discussion and debate. The first agenda should be a roadmap to a successful strike vote and the second one is a modified vote to postpone action and/or take a symbolic vote against the employer if the strike vote appears to likely fail. Members should also be in control of their local decisions and maintain their local power by having alternative tactics available besides a strike. Alternative actions can sometimes create more time for reaching a tentative agreement or building more resolve within the membership to take an affirmative strike vote.

#### The agenda should include these main parts:

- ✓ *Explanation of decision-making process*
- ✓ *Opening remarks by the President or Chief Negotiator (or a designated leader) to explain the state of affairs and what is at stake*
- ✓ *Bargaining Report — keep it concise, factual and focused on the key issues and tone of bargaining*
- ✓ *A strike authorization motion or Plan B motion (best made by a well-known and respected member who is prepared to make the motion)*
- ✓ *Debate that can include questions (Ask supportive members to be prepared to speak and address any known concerns/fears among the membership to build resolve. Keep the discussion to 30 minutes and ask members to keep comments concise to*



**TIP:** Announce the percentage results if they are high but not an actual count to limit people wondering who were the dissenters. Also, if the vote is between 60-80% consider announcing the results as a large majority to send a stronger message of unity.

<sup>23</sup> See Local Bargaining Update Pre Strike Sample WEA.docx.

*allow more folks to speak — less if the sentiment is very clear. For large unions, this time limit may need to be adjusted)*

- ✓ *Vote by secret ballot*
- ✓ *Announcement of results and explanation of next steps and call to action*

**Plan A** — Regardless of the vote margin stated or not in the bylaws, seek a large margin of support (80% or higher) before calling the question on the motion to strike. Review strike assessment information before the meeting and monitor the tone of the membership debate and questions very closely in the meeting. If it seems the membership's support is less than 80%, it is worth considering withdrawing the strike motion to avoid a weak strike vote and put forward a new question (Plan B).

**Sample Motion:** *I move that the Association \_\_\_\_\_ reject the school board's latest contract proposal and authorize the bargaining team to call a strike on XXX date unless a satisfactory tentative agreement is achieved before 6am that day.*



## TIP:

Authorizing the bargaining team to ultimately call a strike allows some flexibility by the team to delay a strike if unexpected things happen in bargaining or something external happens. However, bargaining teams should clearly respect the sentiment of the vote and not delay a strike unless absolutely necessary and/or a tentative agreement is reached.

**Plan B** — If a strike vote does not have a large majority of support, consider proposing a modified motion that rejects the board's latest contract proposal but also delays action to take more time to build up strike support or consider another strategy.

**Sample Motion:** *I move that the Association \_\_\_\_\_ reject the school board's latest contract proposal and authorize the bargaining team to call another membership meeting within two weeks to consider every available legal action.*

**Leading the Meeting.** Frame the meeting with an inspirational set of comments by the President, Chief Negotiator and/or Crisis Committee Chair. Figure out who the best leader would be to give an opening speech. Sometimes it is not the President and that is ok. It should be made clear that the choices are reduced to giving up or standing up. The meeting should be run by Roberts' Rules to provide structure to the debate and to allow members to call the question if the debate begins to become unproductive.

### Other Tips:

- ✓ Ask members to stay in the room and remain off social media (no live streaming!) during the meeting. Ask them to stay and await the vote and then stand with their leadership to deliver the results to the meeting after the meeting concludes.
- ✓ Have staff in the room to help answer questions (Staff Organizer, UniServ Director, Communications, and an Attorney).
- ✓ Have specific actions ready for members to sign up to do such as informational picketing shifts, sign-ups for community phone banks, and sign-ups for items needed to outfit strike headquarters. Concrete "asks" help members channel excited and nervous energy in a productive way. In Arizona, the state affiliate shared a "Walk Out Kit" with every local union to help local leaders prepare for action after the vote. The kit included an action timeline, FAQs, reporting forms, and other pieces to help the local unions prepare for coordinated action.
- ✓ Consider developing a strike handbook for rank and file members similar to UTLA handbook. It included core messaging, background information, media tips (dos and don'ts), definition of roles, picket dos and don'ts, a little of organizing history from the contract campaign, a FAQ on strike, and a FAQ on bargaining process in a pocket-sized handbook.
- ✓ If required, send the legal and/or written notice of the intent to strike as soon as the members authorize the strike.<sup>24</sup>



## Preparing for the Strike

### Locate and Outfit a Strike Headquarters

A good headquarters is in a highly visible location, affordable and relatively central to all of the picket line locations. Here are other things to look for in a space:

- ✓ Two to three rooms for smaller groups, break space and food management
- ✓ Ample parking
- ✓ Access to a larger space for full membership meetings OR an additional space that can be used when membership meetings are needed such as a church, union hall, social hall, etc.
- ✓ Store front with big windows to add visibility in the community
- ✓ Cheap and short-term lease (week-to-week or at least month-to-month)
- ✓ Friendly landlord
- ✓ Reasonably secure
- ✓ Good cell phone coverage
- ✓ Pre-wired for internet connection (using hot spots is possible, but tricky in rural areas with limited cell coverage and multiple users on one network)



**TIP:**

Within the staff, make sure you figure out early on who has the authority to lease office space and set up utilities — certain state affiliate staff and/or local union leaders.

Here is a sample list of items needed to outfit the space:<sup>25</sup>

- ✓ Wi-Fi printers with high print capacity and extra toner cartridges and copy abilities (larger print jobs can be done at a locally owned company or unionized print shop)
- ✓ Tables and chairs
- ✓ Large signs to identify the space, “Burlington Education Association Strike Headquarters”
- ✓ Extra keys to space for key local leaders and staff
- ✓ Coffee pots
- ✓ Coolers and/or mini fridges
- ✓ Cleaning supplies
- ✓ Picket sign making supplies
- ✓ Premade picket signs (laminated for all weather), include some slogans that clearly say “On Strike” to clarify the action

### Prepare for Temporary Replacements

This is a real factor for Education Support Professional members. The strongest defense against the school district hiring temporary replacements is to build a strong community outreach campaign early on and to leverage community pressure against the district — to settle a contract before the strike date. If this fails and the district proceeds with planning to hire replacements, look for pressure points to focus community

<sup>25</sup> See the Strike Headquarter Logistical Needs.docx checklist in the resource section. Most items can be donated by members and/or provided by the state affiliate.

concerns on the quality and experience poised by these temporary employees within the schools. If the bargaining unit includes special education employees, temporary employees will have no relationship with students with special needs, be unfamiliar with IEPs and 504 plans, and be largely ineffective with students. If the unit includes bus drivers, temporary drivers may pose safety concerns with not knowing the bus routes and lack relationship with students to keep students orderly and safe while in route. Finally, if office staff are in the unit, the lack of knowledge about how to run the front office, daily operations and the innumerable duties most school administrative staff offer a school will likely cause a lot of chaos. These real concerns should be shared with parents and the employer to redirect any attempts by the employer to hire replacements squarely back on bargaining a fair contract.

There are additional tactics to consider if replacement employees are threatened to be hired:

- ✓ Contact all substitutes<sup>26</sup> within a 60-mile radius of the school district, even if they work for other school districts and persuade them not to accept work in the strike district if called.
- ✓ Contact temporary employee agencies and encourage them to avoid getting involved.
- ✓ Consider having supporters apply for the temporary positions to learn if the employer is cutting corners to secure enough staff in time for the strike.
- ✓ See if an ally can act as a building monitor to help report problems to the community..
- ✓ Be on the look-out for firms in some states that bring in strike breakers to staff schools.

### **K-12 Student Organizing**



#### **TIP:**

In Ohio, a firm called Huffmaster supplies scabs for education strikes in Ohio. See the Scab Company documents in the resource section for examples of responses prepared by OEA to combat these scab firms.

Younger students may not understand the dynamics of a strike and should be encouraged to talk to their parents for more information. Educators should be clear they wish to remain in the school and classroom but encourage students to seek more information from their parents. For older students, their activism may organically emerge with or without any effort to ask the union for permission or support. Students should be allowed to express their opinions and the best way to support students in these efforts is to share the same community information shared with parents and community allies. Leave tactical planning up to the students to develop on their own. Educators are in a position of authority by nature of being the leader of their schools and should never use this position to influence the actions of student regarding a strike or work action.

### **Last Day Memo**<sup>27</sup>

Issue a last day memo to all members and potential members to remind folks of directives from the employer on leaving school property and keys behind, information on how they will be informed if the strike begins the next day and other words of encouragement. The memo should include contact information for their strike captains and important local leaders for any last-minute questions or concerns. See examples of such memos in the resource section.

<sup>26</sup> See Substitute No Work Request Sample VTNEA.docx in the resource section.

<sup>27</sup> See Last Day of Work Instructions Local Union Sample VTNEA.docx, and Last Day of Work Instructions Statewide Sample AEA.docx in resource section.

## **Student Teachers**<sup>28</sup>

Student teachers may be assigned to work with educators in a K-12 school district headed towards a strike. Survey members to see if any student teachers are in the system. Ask teacher mentors to have a straightforward conversation with their mentees to explain the facts of the labor dispute and encourage them to contact their campus advisors for more information and instructions on what to do in the event of a strike. The crisis committee should work with staff to contact all higher education student teacher programs in the immediate area to alert them of potential strike and ask them to encourage students not to report to their field assignments or to take on any substitute requests. This should be sent to all student teacher programs since some aspiring educators may not be assigned to the district but may be interested in substituting. Consider coordinating with any NEA Student Member Chapters in the area to help foster solidarity and further education of local student teachers.

## **Injunctions and Fines**

In some cases, an employer may request a court to issue an injunction against a union during a strike based on various education laws related to student safety, special education requirements or a risk in falling out of compliance with completing enough student contact days before certain legal dates in the calendar. Courts are typically hesitant to intervene in a labor dispute unless a significant claim is brought forward. Some employers will use injunctions as a threat, including adding fines and damages to potential court filings. Work closely with your attorney to proactively prepare for this common legal tactic. In some states, attempted injunctions are used so frequently that injunction preparation is part of regular strike build up operations such as preparing early parent affidavits to counter the employer's claim that students are being harmed by the potential strike. Do not allow a threat of an injunction to dissuade the local union from organizing.

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<sup>28</sup> See Higher Ed Contact Student Teacher Letter.doc, and Student Teacher Talking Points re Strikes.docx in the resource section.







## CHAPTER 4 — ON STRIKE

The first days of a strike can be exciting, fast-paced and stressful. Adequate preparation separates successful, well-run strikes from chaotic, disorganized and ineffective strikes. Sometimes, we do not have time to adequately prepare all the systems before the strike begins, but these core items will help the first day run smoothly and build member confidence in the fight.

### Leadership and Decision — Making

Every day of the strike should build more member leadership than the day before. Staff may initially lead certain tasks but, as the strike continues, members can take on these tasks to develop their skills and build out the capacity of the union. Strikes provide an opportunity to fully tap the capacity of the membership in unprecedented ways. This could include drafting and collecting daily information for member updates, drafting press releases, creating the schedule of activities for the next day, and even running picket captain daily check-in meetings.

During a strike, decision-making happens under a pressure cooker and requires staff and leaders to work as an effective team. Emotions will be heightened in new ways, so being able to fall back on group agreements will be critical to keep the effort positive and things moving forward. Disagreements will bubble up more easily, so knowing how to address them and prevent a deadlock is key. Remember that, no matter how much you prepare, the team will be tested as pressure builds.

A **core leadership team** will make field decisions. A statewide leadership team should include the state crisis chair, state president, regional coordinators, legislative team, communication team, and core staff. All legal questions should be directed to the designated union lawyer assigned to the strike, and timely decisions/advice should be shared back with members and/or the leadership team. The local team usually includes the crisis chair, president, strike generals, and staff, as well as others who serve a critical role given the dynamics of the strike. The team should be small enough to make important decisions in an efficient manner. The team can always poll picket captains for more information and member responses, but often things come up that require clear, quick decisions.

### Daily Meetings

Every evening, the **picket captains** should meet and debrief the day. The meeting should be mandatory for captains and include the core leadership team, so everyone hears the successes and challenges from the picket lines. Emphasize captains' essential leadership role and responsibility in providing updates on the health of the strike. Since captains may have different perspectives on what worked and did not work, it is helpful to consider a full range of opinions before making any decisions.





For example, if a reluctant picket captain is the only person representing a larger building at the daily captains meeting, feedback and analysis of the success/challenges of the day may be skewed towards minor negative things that are not major concerns to other captains. At the end of the day, daily field reports of success stories and decompressing together will also boost morale. Staff and the core leadership should sit in on the picket captain meetings, solicit ideas for ways to adjust the plan as needed and then delegate the tasks for the next day.

Here is a sample daily captain agenda:

- ✓ **Picket location and/or worksite check-in** (success and challenges on the line)
- ✓ **Logistical needs** (picket location needs or changes)
- ✓ **Collective feedback** on any joint action from the day (ex: unity picket)
- ✓ **Leadership updates** (sharing solidarity messages, strategy adjustments, employer union dynamics, bargaining developments, etc.)
- ✓ **Ideas and feedback** on adjustments for the next day's schedule
- ✓ **Key reminders** (check-in with everyone on their picket team, track attendance, push out information to teams for the next day from strike generals, etc.)
- ✓ **Debrief the day** with all strike captains in the room to build solidarity and power
- ✓ **Plan for Next Day** messages and media (earned and social)

For statewide efforts, an evening daily conference call should be established to check-in from each district after a local picket captain meeting. The statewide core leadership team should participate on those calls to learn how activities went in the field and seek input to help decide what adjustments are needed. The leadership team should also meet to debrief the day and determine if any larger strategy decisions need to be made to shift course given any new developments from the day.

## Bargaining Team Advice

The bargaining team's main purpose is to reach a tentative agreement that members will ratify. It can be easy for the team to get distracted with details in the field or dynamics in the bargaining room. The team must stay focused and remind each other of the priorities set by the membership during the strike build up. They should provide input when necessary to the core leadership team running the field operations, but not get too involved in the details or make decisions on field operations.



The core leadership team running the field operations and/or strike generals and staff organizer should be in consistent communication with the bargaining team and UniServ Director each day. Each group — the “outside” field leaders and “inside” bargaining leaders — should keep each other apprised of important developments that help each other adapt the strategy and tactics each day to keep the membership unified and putting pressure on management to settle. If the bargaining team is not in bargaining, a liaison or all of them should attend the daily debrief meetings and core leadership planning meetings to stay engaged with the membership every day.

When bargaining begins, there should be a plan in place for communicating regular updates to the picket captains and members to avoid redundant inquiries, duplicate responses, and consistent coordination. This communication system can also be used to share strategic information about a board member or administrator who may need more “outside” pressure to move bargaining forward. It also allows outside leaders to share positive developments that help the team keep their resolve and spirits high at the bargaining table. The team should not be discouraged or distracted by what takes place on the picket lines. A strike includes high and low moments in the field and the bargaining team must stay steady throughout to win the best possible deal for the members.

Ideally, the bargaining team works on group agreements within the team earlier on in the bargaining cycle to establish how they will operate as a team and avoid the pitfalls of individual-based bargaining at the expense of the collective. Individual interests may emerge during the stress of a strike, so be prepared to remind the team of the importance of working for the interests of all the members as much as necessary. If needed, have the core leadership team on the outside remind the bargaining team who is ultimately in charge — our members. Also, group agreements should call for bargaining team members to refrain from social media and direct communication with individual members.



### **Legislative and/or Statewide Team Advice**

Much of the advice above applies to a legislative or statewide strategy team as well, especially the importance of building trust within the team/staff and commitment to member priorities and agreements established earlier in the campaign.

## **Field Activity, Strategy and Working with Allies**

Field activities, be it picket lines, rallies, or other events, build pressure and member confidence. Get creative by switching up the schedule to keep members engaged and to escalate pressure on the employer to settle the contract or the target to bring about a resolution. Repetitive activities become stagnant and member and community engagement can easily drop off quickly. Whenever possible, let the leaders and strike captains plan activities. Often the strike captains will have new ideas like a march through downtown, hosting a mock school board meeting, holding a candlelight vigil outside of a targets' homes, and even participating in civil disobedience.

## **Purpose of Picket Lines and Picket Operations**

Picket lines show the human face of member struggles. Community members and board members need to see all the faces of the people impacted by the contract crisis, from the 35-year veteran teacher they had in elementary school to the young teacher and the bus driver. Picket lines also show support and solidarity for our negotiators. They build unity in the collective struggle. They also provide a way to support the cause and get engaged during the strike. It is, otherwise, very hard to keep people confident and unified.

Sometimes members are fearful and ask if they can skip pickets. A picket-less strike or lightly populated picket lines can be seen as a lack of confidence in the strike or the work of negotiators. The public needs to literally see educators not working to “get” that a strike is underway. If a member cannot support a picket line, they should support the strike in other ways at strike headquarters.

## **Picket Generals and Picket Captains<sup>1</sup>**

As part of the core leadership team, Picket Generals should create the daily plan with staff and communicate it to picket captains the day before. They should serve as the main point of contact for captains and attempt to resolve issues as they arise. Picket captains should be the first to arrive and last to leave the picket line. Prior to each day on strike, captains should communicate the next day's schedule and any important updates and reminders to their picket teams. Remember to provide burner cell phones that can call and text any captains to help create a uniform and timely communication system with every captain. Captains should do the following each day:

- ➔ Keep their teams organized using tracking lists in a spreadsheet<sup>2</sup> and a consistent communication system (text, email or phone calls)
- ➔ Track attendance,<sup>3</sup> perhaps on paper, but preferably through a shared database system, and update the strike generals of unexpected member absences. In coordination with the state affiliate, a process should be designed to ensure information is uploaded to NEA360 or VAN after the strike.
- ➔ Note who crossed the picket line and collect observations on replacement workers.
- ➔ Approximate the number or percentage of students attending school if they are open.
- ➔ Record other pertinent information (confrontations, news media activity, police presence, others joining picket lines, administrative contacts, deliveries, etc.).
- ➔ Keep morale up and communicate immediate needs, problems or concerns to strike generals and/or HQ.

<sup>1</sup> See Strike General Role and Responsibilities.docx and Strike Picket Line instructions.docx in the resource section.

<sup>2</sup> See Strike Picket Team Spreadsheet Burlington Example.xlsx in the resource section and consider using Remind, CallFire, What'sApp for real time communication through texting.

<sup>3</sup> See Daily Picket Captain Report.docx in the resource section.

- ➔ Be in charge of the line, including maintaining professionalism, security and troubleshooting problems<sup>4</sup> locally if possible.
- ➔ Encourage members to make new picket signs and chants<sup>5</sup> to refresh the signs on the line to reflect new messaging based on developments throughout the strike.
- ➔ Identify a local picket line media spokesperson, so there's someone prepped and trained ready to talk with press at every picket location.
- ➔ Assign one person to be in charge of social media, to take pictures and post.
- ➔ Track parent, community and business donations such as water and food and share with the core leadership so people can be publicly thanked for their support.



## TIP:

We want to encourage creativity and ways to keep spirits high on the line, but it also must be balanced with educators wearing appropriate clothes (less vacation looking and more like comfortable shoes with business casual clothing) and appearing to be supporting a cause compared to a joyful social gathering.

## Sample Daily Local Strike Schedules

Unless otherwise scheduled, begin picketing each day at the worksite 30 minutes prior to the time work normally begins and continue until 30 minutes after the normal time work ends. Arrange for coffee and snacks at 10:00, shift for lunch between 11:30 and 1:30 and arrange for 15-minute morning and afternoon breaks based on picket captain schedules. Strike generals and the Staff Organizers can create a simple schedule, so a picket line is rarely absent, by staggering teams and reassigning teams from large sites to small sites. Build the first day schedule in advance of the first day of the strike, so that details can be communicated to picket captains and then to picket teams. When all else fails, here is an easy outline to follow: picket in the morning at worksites, plan an all member action/unity activity in the early afternoon, and picket in the afternoon at worksites.

| SAMPLE LOCAL STRIKE SCHEDULES |                                                                                                                                                                           |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DAY ONE                       |                                                                                                                                                                           |
| 6:30am                        | Strike HQ opens                                                                                                                                                           |
| 7:00 am                       | Area coordinators (or picket captains) pick up and deliver coffee to lines                                                                                                |
| 7:30am                        | Pickets begin at each worksite (school or bus barn or key university buildings) and the Central Office/ President's Office                                                |
| 12:00pm                       | Regular update sent to picket captains (via text or email) to share with the line                                                                                         |
| 2:30pm                        | Unity picket at largest worksite (all teams report) (unless members need a full day at their "home" worksites to build resolve and unity with immediate colleagues first) |
| 3:00pm                        | Facebook livestream report by President/spokesperson                                                                                                                      |
| 3:30pm                        | Communications Team meets to determine daily press briefing/statement                                                                                                     |
| 4:00pm                        | Picket lines end                                                                                                                                                          |
| 4:30pm                        | Picket captain meeting at Strike HQ with strike generals and core leadership/staff and bargaining team                                                                    |

<sup>4</sup> See Picket Line Incident Procedure Report Form.docx in resource section.

<sup>5</sup> See Chant Examples.doc in the resource section.



| SAMPLE LOCAL STRIKE SCHEDULES |                                                                                                                                                             |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5:30 pm                       | Communications Team drafts On the Line and community ally update after coordinating with the bargaining team on the appropriate message to send out         |
| 5:30 pm                       | Strike HQ Coordinator and Team determines logistical support needed for picket lines for the next day                                                       |
| 5:30 pm                       | Area Coordinator meeting and/or core leadership debrief with strike generals, President, Staff Organizer, UniServ Director and other relevant staff/leaders |
| 7:00 pm                       | Strike HQ closes                                                                                                                                            |
| DAY TWO                       |                                                                                                                                                             |
| 6:30 am                       | Strike HQ opens                                                                                                                                             |
| 7:00 am                       | Area coordinators (or picket captains) pick up and deliver On the Line newsletter/coffee                                                                    |
| 7:30 am                       | Mass picketing at Central Office/President's Office (all teams report)                                                                                      |
| 9:00 am                       | Resume picketing at worksites and at Central Office/President's Office                                                                                      |
| 12:00 pm                      | Regular update sent to picket captains (via text or email) to share with the line                                                                           |
| 3:00 pm                       | Facebook livestream report by President/spokesperson                                                                                                        |
| 3:30 pm                       | Communications Team meets to determine daily press briefing/statement                                                                                       |
| 2:30 pm                       | Unity picket at most visible place in town/area (all teams report)                                                                                          |
| 4:00 pm                       | Picket lines end                                                                                                                                            |
| 4:30 pm                       | Picket captain meeting at Strike HQ with strike generals and core leadership/staff                                                                          |
| 5:30 pm                       | Communications Team drafts On the Line and community ally update after coordinating with the bargaining team on the appropriate message to send out         |
| 5:30 pm                       | Strike HQ Coordinator and Team determines logistical support needed for picket lines for the next day                                                       |
| 5:30 pm                       | Area Coordinator meeting and/or core leadership debrief with strike generals, President, Staff Organizer, UniServ Director and other relevant staff/leaders |
| 7:00 pm                       | Strike HQ closes                                                                                                                                            |
| DAY THREE                     |                                                                                                                                                             |
| 6:30 am                       | Strike HQ opens                                                                                                                                             |
| 7:00 am                       | Area coordinators (or picket captains) pick up and deliver On the Line newsletter/coffee                                                                    |
| 7:30 am                       | Skeletal picketing at worksites and at Central Office/President's Office                                                                                    |
| 10:00 am                      | Literature drop begins with assigned picket teams throughout town                                                                                           |
| 12:00 pm                      | Regular update sent to picket captains (via text or email) to share with those on the line                                                                  |
| 3:00 pm                       | Facebook livestream report by President/spokesperson                                                                                                        |
| 3:30 pm                       | Communications Team meets to determine daily press briefing/statement                                                                                       |
| 2:30 pm                       | Unity picket at most visible place in town/area (all teams report)                                                                                          |
| 3:30 pm                       | Picket lines end                                                                                                                                            |
| 4:00 pm                       | Membership meeting at local church basement                                                                                                                 |

### SAMPLE LOCAL STRIKE SCHEDULES

|                 |                                                                                                                                                             |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5:30 pm         | Picket captain meeting at Strike HQ with strike generals and core leadership/staff                                                                          |
| 6:00 pm         | Communications Team drafts On the Line and community ally update after coordinating with the bargaining team on the appropriate message to send out         |
| 6:00 pm         | Strike HQ Coordinator and Team determines logistical support needed for picket lines for the next day                                                       |
| 6:30 pm         | Area Coordinator meeting and/or core leadership debrief with strike generals, President, Staff Organizer, UniServ Director and other relevant staff/leaders |
| 7:30 pm         | Virtual Town Meeting for parents held with core leadership                                                                                                  |
| 8:30 pm         | Strike HQ closes                                                                                                                                            |
| <b>DAY FOUR</b> |                                                                                                                                                             |
| 6:30 am         | Strike HQ opens                                                                                                                                             |
| 7:00 am         | Area coordinators (or picket captains) pick up and deliver On the Line newsletter/coffee                                                                    |
| 7:30 am         | MResume skeletal picketing at worksites and at Central Office/President's Office                                                                            |
| 10:00 am        | Finish literature delivery in town/area with assigned picket teams                                                                                          |
| 12:00 pm        | Regular update sent to picket captains (via text or email) to share with those on the line                                                                  |
| 3:00 pm         | Facebook livestream report by President/spokesperson                                                                                                        |
| 3:30 pm         | Communications Team meets to determine daily press briefing/statement                                                                                       |
| 2:30 pm         | Unity Rally on town green/big park with guest speakers (all teams report)                                                                                   |
| 4:00 pm         | Rally ends                                                                                                                                                  |
| 4:30 pm         | Picket captain meeting at Strike HQ with strike generals and core leadership/staff                                                                          |
| 5:30 pm         | Communications Team drafts On the Line and community ally update after coordinating with the bargaining team on the appropriate message to send out         |
| 5:30 pm         | Strike HQ Coordinator and Team determines logistical support needed for picket lines for the next day                                                       |
| 5:30 pm         | Area Coordinator meeting and/or core leadership debrief with strike generals, President, Staff Organizer, UniServ Director and other relevant staff/leaders |
| 6:00 pm         | Small team leaflets board meeting                                                                                                                           |
| 7:00 pm         | Strike HQ closes                                                                                                                                            |

## Here are a few union-led strike activity ideas to fill a daily schedule:

| Basic Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Moderate Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Elevated Activities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>➔ Picket lines at strategic worksites/schools during normal school or university operation hours.</li> <li>➔ Picket line at the central office or President's office (higher education) or any location of management offices.</li> <li>➔ Unity picket at highly visible places in the community with all striking members to create a large crowd.</li> <li>➔ Extended hours for picket lines to allow allies to join the lines.</li> <li>➔ Regular membership meetings to allow members to convene in the community. These meetings can also build morale by sharing messages of solidarity, sing unity songs, and hear in-person updates from leaders.</li> <li>➔ Make sure the local president and state president visit the picket lines. Invite other union leaders and VIPs in the community to also visit the lines and make a big deal about the visits.</li> </ul> | <ul style="list-style-type: none"> <li>➔ Get management's public event schedule and show up with mini pickets everywhere they go. This is particularly useful for University Presidents (higher ed strikes) and statewide leaders, such as the Governor<sup>6</sup> in statewide strikes.</li> <li>➔ Attend community events to table and hand out literature on the strike.</li> <li>➔ Offer members to explain the strike and ask for support from community organizations.</li> <li>➔ Circulate easy ways for community members to help the strike through social media, email as well as ways to donate food to strikers and students in need, times to walk the line with strikers and push management (or state targets) to settle.</li> <li>➔ Translate core literature for communities who do not speak English.</li> <li>➔ Visit neighborhoods with large concentrations of families who do not easily engage with the school due to language, cultural, or socio-economic barriers. Go to where they are, address their concerns and ask for support.</li> <li>➔ Run a member food drive to donate food to families negatively impacted by the strike (school food program shut down during the strike).</li> <li>➔ Phone bank other employees impacted by the strike to check-in, see if they have questions and invite them to participate in solidarity actions.</li> <li>➔ Drop literature door to door with new updates and messages.</li> <li>➔ Leaflet at school board meetings held during the strike and include good questions to ask in the public meeting.</li> </ul> | <ul style="list-style-type: none"> <li>➔ Picket at targets' homes or places of employment</li> <li>➔ Picket at key locations in coordination with other unions who do traditionally do not cross picket lines to broaden impact e.g. preventing deliveries by UPS (represented by Teamsters).</li> <li>➔ Encourage community members, college students (higher ed strikes) and parents to organize their own activities.</li> <li>➔ Hold virtual or in-person community forums — large or small — to make the union available to engage and answer questions.</li> <li>➔ Organize a solidarity march through town.</li> <li>➔ Coffee Socials — small, in-home controlled setting to talk to a portion of your community. A few rules: Have well briefed teams with information on the issues as well as techniques on conducting the session. All guests by invitation only! Have something for them to do. Get their names for your community list.</li> <li>➔ Scab "Greeting" — Find out where the district is parking scab cars. Organize your members to be there with signs and banners to "greet" them as they drive their cars out of the parking area. No profanity, violence or threats.</li> <li>➔ Track scab activities within school/university and make problems known to the community as quickly as possible.</li> <li>➔ Civil disobedience.</li> </ul> |



**TIP:** Local leaders, including the chief negotiator, negotiators, and the president should be out on picket lines as much as possible. Members want to see their leadership and it helps these leaders see first-hand what members experience out in the public while on strike.

For statewide actions, the state president and state board members should do the same to help build morale in each region of the state.

- ➔ Create "traveling" picket teams to visit and co-mingle with new colleagues throughout the day. This is particularly helpful for smaller worksites who may only have one or two picket teams and may need additional support to take breaks.
- ➔ Use creative picket site locations throughout the day.
- ➔ Use morale boosting activities such as chants and songs.

<sup>6</sup> In Arizona, members picketed every public event held by the Governor and picketed outside radio and TV stations while he was being interviewed.



Other tips for daily field plan/activities (many of these tasks are mentioned in the picket captain duties):

- ➔ **Breaks.** Plan in reasonable breaks for members on the line so people can rest and eat. Also be aware of and accommodate members' health concerns and physical limitations as necessary
- ➔ **Parking.** Find easy parking locations around picket line locations and/or large gathering events
- ➔ **Human Needs.** Organize bathroom locations and places to warm up/cool down near activity locations. This is a great opportunity to ask for solidarity support from retired NEA members, parents and community allies who may live near activity sites
- ➔ **Know Your Options.** Know all the high visibility locations so you can mix up the locations throughout the strike. Also be familiar with local laws for protests, marches and pickets. Do these activities require permits? Liability insurance?
- ➔ **Build Power.** Pick activities that build power and a sense of collectivity between members. Encourage picket captains to mix and mingle throughout any activity to keep spirits high and gather useful information on member morale
- ➔ **Celebrate.** Find ways to celebrate each day
- ➔ **Lift Spirits and Have Fun.** Use chants, songs, and fun ways to keep members engaged on the line
- ➔ **Membership Meeting Site.** Find a location — ideally, the same place for consistency — to hold full membership meetings if the strike HQ space is too small. Churches and union halls are usually free and accessible. Ask the membership for ideas because they often have connections to event spaces that can be used for free
- ➔ **Security and Safety on the Lines/Rallies.** Visit potential picket sites before the strike to determine the physical layout and where it is safe to set up picket lines or not. In some rural areas there can be no sidewalk in front of the school and/or the school is located on a very quiet road. Find a safe and highly visible location as close to the school/worksites as possible. Line up security for the picket lines. At minimum, notify the local police/sheriff of the strike schedule for the day, locations of events and number of people expected and request the authorities to drive by/check-in on the line throughout picket. Make sure picket captains have contact information for local authorities with them in case something comes up. When necessary, consider hiring a private security company to maintain safety on the line. South Burlington, VT considered hiring private security given other activities earlier in the school year that caused school safety concerns for educators being in front of school buildings.

For statewide actions that involve large crowds at the state capitol, consider coordinating with the capitol police and alert the local police and fire departments. Consider weather conditions as well to keep members safe, including finding ways to offer cooling/heating stations during the day.
- ➔ **Plan Ahead.** We should be planning activities and thinking ahead during a strike to help keep momentum and pressure building. Be particularly mindful of weekends because members will need to spend time resting but they can also easily feel disconnected and worried without the daily contact with their colleagues. It can lift spirits and build momentum going into the next week to plan a Sunday or Monday community solidarity rally for a strike that goes over a weekend.
- ➔ **Students on the Line.** Be sure to plan in advance about how to handle student supporters who show up to the picket line or want to organize solidarity activities.
- ➔ **Working with Allies.<sup>7</sup>** Community and union allies can often take more assertive steps than the union to build pressure on decision-makers. In order to harness the power of our allies it is important to be strategic on when we can and cannot collaborate due to limited capacity by the union or activities that would put the union in a legal quandary.

<sup>7</sup> See DCTA Labor and Community Solidarity Tracking.xlsx and Strike Support Volunteer Schedule and Roles Denver Example.docx in the resource section.

Be clear with allies about what would help and hinder the strike. The ultimate focus should be on bringing decision-makers back to the table to reach a settlement or resolution that benefits members and the community. Tactics that unnecessarily embarrass or shame individual decision-makers or distort the union's message can easily become distractions and backfire on collective efforts to advance the core issues.

Offer tactical solidarity ideas and activities. This can include community "versions" of many tactics used during the strike buildup or simply organizing allies to show up to union activities. Allies can also make introductions to new community groups by using their networks. This can include helping the union translate outreach materials, meeting with non-English speakers, or finding the appropriate way to enter neighborhoods that may be unfamiliar or distrustful of the union due to the strike.

Ask allies to help educate their networks. Help allies clearly understand the union's positions and message to become effective surrogates for the cause. Ideally, there are many issues involved in the strike that also benefit the larger community making common messaging easier. However, sometimes core financial issues such as salary or benefit increases can get trapped within old message frames that demonize educators for being overpaid compared to their working-class neighbors. Work with allies to counter this narrative and find points of shared interests to effectively reach more community members. In the UTLA strike, community organizations organized Action Schools for parents and community members, providing an organized space for people to learn about the issues and self-organize tactics that put pressure on the school district in ways the union could not.

## Internal Operations and Strike Headquarters

The strike headquarters becomes an operational hub during a strike. It is important to use the members who report to HQ, as well as leaders (Strike HQ Coordinator<sup>8</sup>) and staff assigned to operations, effectively throughout the strike, so that things stay organized during the long days.

Here are the core internal systems to consider putting in place as early as possible:

- ➔ **Strike Loan System and Appoint a Loan Coordinator** (if applicable). Create a clear system for members to apply for state affiliate or local union strike loans at headquarters. Appoint one person to administer the forms, collect necessary information for the loans and handle all the confidential paperwork. Members using the loan system should be encouraged to only apply for what they need in a pay cycle to allow funds to be shared with as many members as possible. If the local union uses a state strike loan fund, the loan coordinator should be in close contact with applicable financial staff at the state affiliate to transmit information in a timely manner. Make sure members come to the headquarters to complete paperwork, so that forms are correctly filled out and accurate answers can be provided.



### TIP:

If you have a strike loan fund, dust off internal operations on how to process loans and what is needed, especially if state has not had a strike in recent years. Make sure someone from the financial office of the state affiliate is in regular communication with loan applicants throughout strike and afterward with updates related to salary not being interrupted and loans being nullified or not. See VTNEA Strike Loan Application Form.docx in the resource section.

<sup>8</sup> See Strike Headquarters Coordinators Role and Responsibilities.docx and Strike Headquarter Logistical Needs.docx in the resource section, if these systems were not set up prior to the first day of the strike.

- ➔ **Strike Donation System.** Create a clear way for allies to support the strike either through a financial donation fund or with clear items to purchase that benefit the overall cause. We advise local unions to only collect funds that benefit the strike.
- ➔ **Regular and Well Publicized Hours for HQ and Greeters.** The headquarters should open at least one hour before picket lines begin and close at least one hour after picket lines close. During the weekend, set reasonable hours based on the schedule of activities that allow members to rest, but also provides a communal space for members to meet with allies and each other. Also, appoint “greeters” and people to answer the phone throughout the day who are ready to handle new arrivals.
- ➔ **Child Care System for Members.** For members who live within the district or impacted by a statewide strike with children in grades K-8, set up a child-care system run by members to allow people to participate in strike activities. See the resource section for more tips on how to establish a safe system for everyone involved.
- ➔ **Food and Support to the Lines.** Create a daily system and team to handle basic food and logistical support for the lines. This varies depending on the size of the union, weather and dynamics of the strike. At a minimum, see if the team can create a snack, coffee, and water delivery system, so that picket lines have regular visitors and supplies.
- ➔ **Command Central and Rumor Control.** HQ and/or the core leadership team should be ready and able to troubleshoot issues and address rumors as they arise.
- ➔ **Financial Tracking System for Expenses.** Create a daily tracking system to monitor expenses to avoid overspending. This allows for informed planning when a larger expense may become necessary (ex: rental of a large hall or sound equipment for a rally). Ideally, make a spreadsheet accessible to core leaders to track expenses by the local union and state affiliate and have the Staff Organizer and HQ Coordinator know the bottom line each day. All expenses should be tracked with receipts and any reimbursements must be for items pre-approved by someone on the core leadership team and/or HQ Coordinator. Determine who is allowed to make financial decisions for the local union and how that will be handled during the strike.

## Communications

The pace of communications, both internal and external, will quicken once a strike begins. Members will be anxious for more regular updates from local leaders. The employer (or state) will likely increase their own communication activities such as releasing daily press statements. The communications team may need to expand efforts to get messages out faster. **The two most important things to do are: update members and stay ahead of opponents.**

To do so, the union should be nimble and respond to developments as they occur by having a dedicated communications team. If the strike continues beyond a couple of days, consider adding voices from the membership into the mix who are ready to speak to the media. Diversifying the “face” of the strike beyond the spokesperson can counter any narrative that only a few union leaders support the strike or care about the issues.

### Traditional Media and Earned Media

The easiest way to get the message out as well as to continue to be a front-page story is to plan actions that will draw the media. Large crowds, new allies, creative tactics and events timed to fit easily into the news cycle will usually help. But, sometimes, extra effort is needed to invite the media to events and



provide photo or video content for the story. Be flexible and accessible to the media to continue to be a trusted, first-hand source. Try to build productive relationships with local reporters as early on as possible. Prior to the strike, share all pertinent background information related to the labor dispute with the media. Information may need to be provided again and again to make sure the media coverage is accurate. It can help establish a consistent and accurate narrative about the union.

Encourage the spokesperson to take a few minutes to prepare before calling the media back or going on camera. Some members benefit from pre-written statements or outlines to remember the core messaging points and frame. Everyone benefits from taking a little time to prepare especially when emotions are high, and energy is low from days on the line.

### **Self-Made Social Media**

Making your own media is a critical piece of any strike because the media will not always get things right or cover every important moment. Use your established social media channels to document the strike, build followers and continually tell your story. Consider these easy social media posting ideas:

- **Host Facebook live streams** with the President or spokesperson to report from the line and provide daily updates on the strike.
- **Use the #RedForEd hashtag** instead of a bunch of new hashtags.
- **Encourage members to use their own social media pages** to spread the message but remind them to stick to it as closely as possible. If members are unsure on what to post or leery of dealing with potential push back on-line, encourage them to stay off social media.
- **Post photos and videos** (under 2 minutes). Visual content is rewarded on social media with higher placement in newsfeeds.
- **Share new information with members first** before posting it online through internal communication methods before they read about it elsewhere.

### **Internal Communications**

Advanced planning for the different channels of inter-union communication between staff and local leaders, local leaders and members, and among staff is key to reducing the amount of nervous back-and-forth messaging and will help meet the expectations of rank-and-file members. Your team should ask:

1. How will each vehicle communicate with each other?
2. What is the preferred method of communication?
3. What developments necessitate a response?

Consider appropriate protocols for staff/bargaining leaders communicating updates between 5 am and 10 pm to allow members to get rest for the next day. Use these tools to help create controlled systems for communicating with the full membership and the community:

- **Peer-to-Peer Texting.** Use peer-to-peer programs like Hustle to send text messages to large groups of people. It allows the sender to send out a consistent message directly to recipients but does not allow a recipient to text back the full list. Picket captains can use smaller group text lists with their own team, which are easier to manage. Once on strike, consider sending regular text messages out at designated times to minimize excessive inquiries from picket captains and local leaders. Regular text updates may be “No news yet — but keep it up. Coffee deliveries are going out within the hour.”

- ➔ **Mass Emails.**<sup>9</sup> Use programs like MailChimp, Action Network or Every Action to allow mass email messages and prevent recipients from hitting “reply all.” Do not use mass emails on Gmail or other regular email platforms.
- ➔ **Community Messaging.** For community allies and/or colleagues not on strike, make sure to send daily communication at least via email. Build an email list, if it does not exist, by enlisting the help of supportive parents and allies. You can also phonebank community members using targeted lists to push out timely updates or support requests. Also, consider grassroots communication methods like dropping literature<sup>10</sup> at doors or holding community meetings in neighborhoods where people may not be able to access social media, email or texting technology. Find ways to be in regular communication with the community no matter what methods you use. Keep track of major organizational allies<sup>11</sup> and what they are willing to do to support the strike.
- ➔ **Robo Calls.** Sometimes a message can be adequately shared in a quick text or email, but sometimes members need to hear a familiar voice. Consider using a phone vender or other program to record encouraging messages by the President or VIP supporters and push that out to members on strike. It can build resolve during hard stretches.
- ➔ **Newsletter.** Considered a classic daily communication source since the earliest education strikes, the newsletter provides updates and stories from each day of the strike. While electronic versions can be emailed, printed versions should be on hand at the headquarters and distributed each morning of the strike to those on the line. Several effective examples are included in the resource section of this manual.
- ➔ **Phone Trees.** Develop a phone tree that is easy to use at strike headquarters with all the local leader information, especially picket captains, so members can easily find people. A phone tree is also helpful when more complex or sensitive updates need to go out, but it is not suitable for texting or email.



## **Local Bargaining Strike Strategy and Support**

The UniServ Director normally assigned to the local on strike focuses on bargaining strategy, staying in touch with the bargaining team and finding a way to settle when the time is right. Additional staff and strong local leaders can take the lead on running field activities. Keep open communication channels between the UniServ Director and additional staff engaged in the strike, so that bargaining preparation and information flows between the groups before it hits the media. Staff and local leaders in the field should keep the UniServ Director and bargaining team updated on the sentiment and concerns of the membership to help focus the bargaining team on what is needed to reach a settlement.

<sup>9</sup> See Member Talking Points on Strike Burlington Example.docx in resource section.

<sup>10</sup> See Community Flyer Example San Juan WEA.pdf and Literature Drop Pre Strike Sample VTNEA.pdf in the resource section.

<sup>11</sup> See DCTA Labor and Community Solidarity Tracking.xlsx in resource section.

## **Dos and Don'ts in Tentative Agreement:**

- ➔ **DO be clear with the membership on how a tentative agreement will be brought to members before ending the strike.** Will members vote on a tentative agreement before returning to work? Is that practical given the timing of a tentative agreement that occurs in the middle of the night? Will members be asked to return to work and then vote on the tentative agreement within 24 hours? Find a process that works for the union and make it clear ahead of time, so members are not confused or frustrated with the process. Voting before ending the strike and returning to work is the best practice because it can be very hard to return to the picket lines if a tentative agreement is voted down after members return to work.
- ➔ **DO NOT bargain on the first day of the strike.** The strike build-up and last bargaining session with management relied on setting expectations for management to move toward the union's proposals to avoid a strike. If the team returns to the table once on strike, it can undermine that position and the efforts of the crisis committee to rally members and the community around the issues raised in the strike. Allow pressure to build and dynamics to shift within the bargaining room before returning to the table.
- ➔ **DO strategically decide how to avoid continually bargaining with the employer if significant progress is not being made.** It is important to be available to bargain but also know when it is counterproductive to remain at the table. Continual bargaining over several days' exhausts bargaining teams and builds anxiety on the picket lines. Determine what is reasonable in terms of continuing to bargain versus taking a break. Help local leaders know when it is critical to stay at the table or to walk away. In some state's employers can legally impose working conditions on a union if there is not a settlement and this could emerge if bargaining stalls out during a strike. Coordinate with the communications team to develop smart messaging to explain clearly why and when bargaining is deadlocked and repeat the overall narrative about the benefits to educators and students that the union is fighting for.
- ➔ **DO make yourselves available to bargain at the invitation of a mediator.** Any other answer can easily harm public support for the union and be twisted into the union seeming unreasonable or unwilling to end the strike. Help prepare the bargaining team and membership to understand the limitations of a mediator. A mediator cannot force an agreement upon both parties, nor significantly change sour dynamics between the union and management in one session.
- ➔ **DO leverage the power of the strike to elevate non-financial topics.** Recommitting to these issues during the heightened moments of the strike can help gain new public support. These issues must be part of earlier proposals even if management ignored them earlier on to avoid charges of regressive bargaining and unfair labor practice charges. Raising these topics as part of your outreach and public messaging before you go on strike will also help ensure they do not come as a surprise. Consult with your local attorney.
- ➔ **DO develop proposals and alternatives with the members while on strike.** The bargaining team can often benefit from additional thinking and testing of new ideas to find points of compromise and clarify thinking by bringing in groups of members to work on proposals together.
- ➔ **DO stay true to the needs of the membership as well as what is practicable within a potential settlement.** Staff are there to advise. Bargaining team members do their best to make sound decisions that benefit the most members possible. Remembering what the members' want has to be balanced with the realities of the bargaining dynamics. Ultimately, any tentative agreement needs to be approved by the colleagues walking the line and waiting for an acceptable set of terms.
- ➔ **DO NOT hold marathon negotiation sessions.** If you're negotiating longer than a continuous 8 hour stretch, consider ending the session and returning rested in the morning. Members, Students,







➡ **Exhaust All Issues.** Raise every possible issue to attempt to make headway on items that did not gain traction earlier in bargaining. You will not have as much leverage later to make big gains.

➡ **Non-Striking Employees.** Address any potential negative impacts on non-striking staff. Will the district be willing to pay hourly staff who were out of work during the strike or offer ways for staff to make up missed hour? Attempt to leverage the strike to benefit as many employees as possible to stand in solidarity with everyone impacted by the strike. Consult with these employees to understand what they need and how to best support their transition back into work.

➡ **Media Post-Settlement.** Agree on how both sides will address the media after the tentative agreement, including a commitment to not undermine the other side and to wait to release statements until both sides can inform their members. If possible, agree on a joint announcement and press conference.

➡ **Key Timelines.** Address any items that need a specific timeline for action, such as the beginning of a new workplace practice or schedule change, etc.

➡ **Fines and Legal Proceedings.** Forgive any fines issued and/or drop any unfair labor practice claims or threats of court injunction filings.

➡ **Non-Reprisal.** Establish a non-reprisal agreement to prevent the employer from disciplining, retaliating against or firing any employees involved in the strike for the duration of their employment.<sup>12</sup> Also establish a non-reprisal agreement to protect students who may have been supportive of the strike from discipline or retaliation. Include parameters on how the strike will be discussed by management after the strike, such as avoiding disparaging comments about the strike, strikers or union leadership.

➡ **Enforcement Clause.** Add an effective enforcement mechanism citing the contract's grievance procedure or using binding arbitration if the tentative agreement terms are violated.

➡ **Down Time Drafting.** There is often a lot of down time during bargaining sessions, so take that time to begin to draft elements needed in a tentative agreement. See an example of a return to work agreement/MOU in the resource section.

**Organizing Plan.** Coordinate a plan with the crisis committee for walking back together as a strong and united membership. This can be simply meeting early before the workday begins and entering buildings together or other creative strategies to mark the day. Have a plan to thank supporters and return to work as a unified membership.

<sup>12</sup> See the Return to Work MOU Example #1 WEA.docx and Return to Work MOU Example #2 WEA.docx in the resource section.

## **Statewide Legislative Strike Strategy and Support**

Ending a statewide strike or walk-out should be decided democratically instead of unilaterally by state leaders or staff. Develop the process if it does not exist before members are out on strike and make it known during the buildup process how the union will decide to end the strike or walk-out. There will be many long-term benefits from being transparent about the decision process as early as possible in the campaign. Members will invest more in the campaign due to the role they will have in the outcome, feel more ownership of their union, and more confidence in the statewide crisis committee and statewide leadership.

### **Formally Ending the Strike**

Before a union goes on strike, local leaders and staff should know how to formally vote to end the strike when the time comes. For statewide strikes, establish the terms and process for how the decision will be made and affirmed by regional or local unions. Do not allow media in the room during deliberations. Hold a press conference after the meeting in accordance with any agreement made with the employer related to talking to the media.

For local strikes, check the local union's bylaws to determine any specific rules unique to the local union. If local bylaws are silent, determine a process that is clear ahead of time, so members are not confused or frustrated with the process once on strike. Call the membership meeting to take place as soon as possible, and ideally during the day when members are still on strike.

If a tentative agreement is reached overnight, refer to the prior process decision on whether the union will continue the strike until the membership can meet or whether the union will conditionally return to work and then consider the tentative agreement. When the time comes, separate the vote to ratify the contract from the vote to end the strike. The first motion should be to consider the terms of the tentative agreement and the second motion should be to end the strike.

*Motion 1: The \_\_\_\_\_ Education Association, agrees to the terms of the tentative agreement presented by the bargaining team and contingent on the Employer also accepting the tentative agreement.*

*Motion 2: The \_\_\_\_\_ Education Association, agrees to end the strike immediately, given the ratification of a tentative agreement and contingent on the Employer accepting the tentative agreement. We will return to work on \_\_\_\_\_.*

Sometimes circumstances require that a union end a strike prior to reaching a full agreement. Under those circumstances, the union should communicate in writing that the striking bargaining unit unconditionally offers to return to work, but this action is not considered an acceptance of the employer's bargaining proposals. Here is a sample motion to use:

The \_\_\_\_\_ Education Association, hereby makes an unconditional offer to return to work. This offer does not constitute the Association's agreement to the Employer's contract proposals. The Association stands ready to continue collective bargaining with \_\_\_\_\_ (name of employer).



## General Advice

Here are a few more points of advice collected from experienced strike field staff:

### *What happens when a strike drags on without a clear end in sight?*

Taking time to build an escalation plan that makes the most of the first 7-10 days on strike can help make the initial days of the strike so uncomfortable that the employer concedes early on. Also, understand power dynamics within a community by doing power mapping and meeting with members of the community who hold a lot of power to help break a deadlock.

### *How do you prepare and moderate member expectations on what is possible during a strike compared to what will take years to win?*

As early as possible, work with local leaders to put the strike into context. It is a tactical part of a larger effort to build the union's power to tackle larger issues. Much like one political election cannot immediately change every policy or law that wrongs working people, one strike cannot immediately improve every issue. Within bargaining updates and organizing work, leading up to the strike, try to balance short-term expectations for the fight ahead with long-term aspirations beyond the strike. When a tentative agreement is reached make sure to note what areas of the settlement breaks new ground and/or was not possible without the members going on strike and what is newly possible due to the strike. Do the same kind of update to community allies who stood in solidarity with the union to push larger thinking on what is possible to improve the education system's support for the community.

### *What happens if the membership rejects the tentative agreement and wants to remain on strike?*

Unions are democratic organizations and the membership could reject the terms of a tentative agreement. First, check the local bylaws to determine any rules regarding tentative agreements and strikes. If the bylaws are silent, attempt to create rules long before a strike to make sure the process is clear and democratically adopted by the membership before the pressure of a crisis. Otherwise, if there are no preexisting rules, it is highly advisable for the bargaining team to remain in constant communication with members to maintain confidence in the terms of a tentative agreement. A ratification vote and a vote to return to work should be separate decisions. This prevents a premature vote to end the strike or prevent the union from striking again if a satisfactory settlement is not reached using a different bargaining team/strategy.

If the membership rejects the terms, it can do one of three things: 1) continue the strike if there is still unity, 2) make an unconditional offer to return to work or 3) restart bargaining with a new bargaining team. If a tentative agreement looks like it will fail, the membership should vote down the tentative agreement by a large margin to help jump-start the next wave of organizing and build more collective power. A bargaining team could or could not be replaced in these scenarios depending on local dynamics such as a divided or exhausted team or a strategic opportunity to bring in new voices. There will be a lot of new work ahead if a tentative agreement is voted down, so begin preparing for this reality as soon as possible. For statewide efforts, consider using field staff and a clear message for statewide leadership to explain why returning to work is in the interest of the members and the larger education system. We cannot always win every demand, especially the not the first time that a union takes a stand.

### *What happens if the employer wins an injunction and forces some or all of the striking educators back to work? And/or what happens if the tentative agreement is weak but as much as can be won in the short run? How do we rebuild our power?*

In some states, injunctions during strikes are so common they become part of the strike build up strategy. This way, members are prepared for this tactic and how to respond. In either case – an injunction or a weak tentative agreement – consider this a pivotal moment to recommit organizing the members.

# CHAPTER 5 – AFTER A JOB ACTION

Once the strike concludes, it is common for members to feel relieved, exhausted, and ready to return to work and take a break from union activism. This reality makes harnessing newly developed power difficult. If the results of the strike were less than desirable, the post-strike phase can also be riddled with disappointment. The post-strike time should be used strategically to move the union forward, build on the wins and losses of the fight, and cultivate new energy to move into the next phase of union building work.

## Immediate Next Steps

### Returning to Work<sup>1</sup>

Three things can make this transition back to work much smoother:

1. Telling people what they can expect.
2. Letting them know where they can turn for help.
3. Enlisting the help of picket captains or hand-picked members who can help facilitate sharing of important information and listening to members' concerns.

The earlier information is shared with members on what they might expect, the better. Some unions use the contract ratification or back-to-work meeting to begin to counsel members. The following is a list of typical things members may anticipate.

- ➔ Some principals/supervisors will be very awkward in dealing with the strike, and with newly assertive members.
- ➔ Some may try ill-advised “reconciliation.”
- ➔ Others may try to make members feel guilty.
- ➔ Some may try to prevent discussion of the strike in faculty or staff rooms.
- ➔ Some may extend an olive branch.
- ➔ Others will understand and handle it just right.
- ➔ Students will have mixed feelings. Some may want to talk. Some may have concerns about grades, makeup days, etc.
- ➔ Many parents will be supportive. Some will not.
- ➔ There may be administrative recriminations, including educators being passed over for department chair or other opportunities.
- ➔ Expect members to be disappointed with some of the agreement.
- ➔ Scabs may have “rearranged” member rooms.
- ➔ Members may find their new “power” a little uneasy to handle at first.
- ➔ The administration may try to seize the “initiative.”
- ➔ The administration, community, news media, students, even some other employees, may try to put members through a guilt trip.
- ➔ Don't expect others to understand or appreciate the experience members went through.

<sup>1</sup> See Post-Strike FAQ for Member MEA.doc and Post Strike Member Advice Memo.docx in the resource section.

- ➔ Do not lose the new bonds built between members and larger membership. Find ways to continue to keep the membership connected, such as with social engagements, transparent and ongoing communication between union leaders and members, and debrief meetings with rank and file members as needed in each building.
- ➔ Members may experience disillusionment with work for a while.
- ➔ Some people will experience post-strike stress and will need the support of colleagues or professional help.
- ➔ Membership may drop off. Double back to new members who joined leading up to the strike and explain/re-explain the value of the union. If cost is an issue, share ways to make dues affordable by using NEA Member Benefits programs.

To help local leaders or picket captains deal with member problems, we can do the following:

- ➔ Train them to look for problems and ways to communicate and be supportive.
- ➔ Train them on problems people experience.
- ➔ Advise them to hold periodic faculty/worksite meetings to check on how people are doing.
- ➔ Show them avenues for additional help.

### **Debrief with Core Leaders and Staff**

Organizing a thoughtful and intentional debrief with various iterations of strike leaders is the most important step to take after members return to work. Debrief with the bargaining team, core leaders, picket captains, and eventually staff. Every strike offers a chance for local leaders and staff to learn what worked, what did not work, and what should be replicated in the future for another strike. Debriefs also allow a space for critical next steps to emerge and document unfinished business from the strike. Members also have different experiences during a strike given their leadership roles, physical placement, and access to internal and external developments during the strike. Debriefs also allow people to share those experiences and learn together.

Strikes are not static, formula driven actions. Every strike unearths new approaches to organizing and can offer new tactics and strategies for the next action. Even the state or regional staff should debrief ways to better serve other locals in the future and adjust go-to strategies and thinking on strikes.

Ask yourselves these questions:

- ✓ *What worked well/not well internally, as a union, with our members; with our non-members; and with the non-striking staff?*
- ✓ *What can we continue to use in our internal union operations (ex: leadership structures, communication methods, etc.)?*
- ✓ *What needs to be done next with our members because of the strike (ex: clarification of issues, inoculation to counter the employer's rhetoric, returning of borrowed furniture from strike HQ, etc.)?*
- ✓ *What needs to be done next with our non-members? Members or non-members who crossed the picket lines? Our colleagues who were not on strike?*
- ✓ *What worked well/not well externally with parents, the larger community, our allies?*
- ✓ *What needs to happen next with our parents, community, and allies? How do we thank our supporters?*
- ✓ *How do we best reconnect with our students?*





- ✓ *How do we stay connected with our parents, community, and allies going forward?*
- ✓ *What is our collective story about our strike? (Make it positive, real, and forward-looking and encourage people to develop a common analysis of what happened, what was won, and what is yet to be won.)*
- ✓ *What is the next thing we can do to strengthen our schools and community that may be outside our traditional subjects of bargaining? How do we learn what that is, if we have not asked that question before as a union?<sup>2</sup>*
- ✓ *Collect information for the work ahead, including school board members' terms, contract terms for the Superintendent or University President, total money spent on hired attorneys for the employer or anti-union firms, etc.*

## **Organize Celebrations and/or “Now What” Events**

Plan to meet in the parking lot and walk back into school together. Create videos and take photos walking back into school to post on social media. Share these images with the media. Find other creative ways to reconnect with students in a celebratory way.

Every job action — no matter the length, size, or outcome — is a victory for the labor movement and should be celebrated. Members and local leaders tend to gravitate towards returning to their life before the strike and even minimize the need to convene to celebrate the strike. A union that skips a celebration will likely revert back to functioning in ways it did before the strike — when less people engaged, fewer leaders stepped forward, and members tended to be more passive. It is critical to encourage the union to bring members back together, honor their courage, and thank those who stepped up to leadership roles — especially new leaders who do not hold traditional union leadership roles. Also, publicly thank businesses who supported the strike and allies who took large public roles.

The event need not be labeled a celebration, especially if it involved a weak settlement, but it should be intentional and open to all members. If there is a weak settlement, this event can become the rallying point to launch the next organizing effort to make sure a better agreement is secured in the next round of bargaining.

For all types of events, use it as a chance to affirm a collective achievement, reinforce critical learning from the debrief, and communicate collective next steps. Be sure to offer tangible next steps to encourage

<sup>2</sup> See Evaluating an Organizing Issue Labor Notes.pdf in the resource section.



members to stay engaged in the immediate future. Also, consider inviting non-members to the event, especially if they were engaged in the strike; get their feedback; and draw them further into the union. Some schools struggle to maintain high membership, so simple steps like these can help give these schools a boost in recruitment efforts.

Be creative in the event of a statewide strike. Find ways to celebrate regionally and locally in the more immediate timeline and bring people back together at state affiliate annual events. In all settings, resist the urge to return to business-as-usual modes of operating.

In Arizona, AEA moved directly into political organizing to build on the strike momentum. Members collected over 270,000 signatures to put a referendum on the state ballot to fully fund public education. This work became an extension of the strike because the legislature and Governor did not fully fund education in the budget passed at the end of the strike. The Saturday after the strike, AEA held statewide trainings on the ballot initiative and had high participation throughout the state. Every week that followed included petition signing events, debriefs, and efforts to build camaraderie among members.

### **Spike the Ball — Explain the Win**

Messaging work does not end with the last press release announcing the settlement to the public. Make sure to develop a communications plan that includes defining the story and win from the strike. Develop this narrative before the strike officially ends, so you can share it with members and the community before management has a chance to define the strike. In Denver, CO, the local union developed a “spike the ball” narrative to define what they achieved during the 2019 strike.<sup>3</sup>

### **Logistical Wrap Up**

Every strike requires some level of ramping down and logistical wrap up. Here is a quick checklist of common steps to end a strike:

- ➔ Shut down strike headquarters. Return borrowed equipment, donate unused food, clean up space, end lease, and shut down utilities as soon as possible.
- ➔ Follow up with strike loan recipients (if applicable) to be clear on repayment terms.
- ➔ Close out strike financial tracking and take care of any local-state cost sharing terms.
- ➔ Close any donation sourcing sites for general strike operations.
- ➔ Update online communication hubs — website, social media, community email listservs, etc. — with necessary information and gratitude of support.
- ➔ Organize a community “thank you” event.
- ➔ Thank donors and key allies who stepped forward.
- ➔ Archive organizing plans, materials, leadership lists, contact information, and communication systems; and determine how to transition certain pieces into ongoing union operations.
- ➔ Archive pictures, videos, and other mementos from the strike for the union’s archives.
- ➔ Share tips on how to reconnect with students upon returning to school.
- ➔ Document which local businesses supported the strike and share the list with members and supporters.

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<sup>3</sup> See Denver Spike the Ball Messaging Example.docx in the resource section.

## Long-Term Next Steps

### Enforcing the New Contract

In most successful strikes, the union wins a new and better contract. Members also possess a greater awareness of the contract and its importance, having been on strike to win the contract. However, left unenforced, the contract can be subverted or lost to an administration focused on regaining what it lost in the strike. A post-strike plan must include a rigorous plan to enforce the contract.

That plan includes:

- ➔ Getting the contract printed, posted, or emailed to every member, so it is accessible as soon as possible. The agreement may remain a tentative agreement until final language is written, but make sure members understand what the new provisions are as soon as possible.
- ➔ Recruiting grievance representatives for each worksite.
- ➔ Training grievance representatives on new elements of the contract.
- ➔ Distributing communication to members regarding what the contract provisions mean and how the grievance process works.
- ➔ Reporting of grievances to members.

### Cultivate New Leaders from Grassroots Groups and Online Communities

New leaders likely emerged during the buildup and strike who played vital roles during the crisis campaign. Most of these new leaders likely do not hold a formal elected role in the union and may not be interested in holding an official role. In many new state campaigns, such as Arizona and West Virginia, educators formed grassroots organizations to connect and take leadership over statewide strikes or walkouts. In other locations, especially large urban unions, a new caucus of members self-organized and began to engage their unions in new ways. These new leaders represent an important constituency within the union, and we must invite them to the table and organize together after the strike.

The traditional work of local elected positions usually does not mirror the work of a strike and can make it hard to find immediate and easy ways to find roles for these new leaders. Encourage the local union to find new ways to make room for these emerged leaders that capture their skill set, interests, and demonstrated commitment to the union. In virtually every set of local bylaws, unions allow ad-hoc committees, so use this time as an opportunity to continue organizing in ways that fit the needs of the union and community after the strike.

Here are some easy committees/topics to consider:

- ✓ **School Board Election (or University Board of Trustee) Committee** — To work on candidate recruitment, current board member term research, candidate criteria, and election or appointment process preparation.
- ✓ **School Climate Committee** — To examine school climate issues related to morale, working conditions not addressed in contract, and parent-student-educator school climate; and create an organizing plan to address issues.
- ✓ **Community Outreach Committee** — To continue community outreach work started during the strike, work to develop existing relationships and establish new ones, facilitate a common agenda, and identify shared interests.
- ✓ **Internal Organizing and Communications Committee** — To strengthen internal communication and organizing efforts with members.



- ✓ **Political Action Committee** — To coordinate political action beyond local school board elections or the Board of Trustee appointment process, including voter registration, legislative action, and political education work with members and the community.
- ✓ **Membership Committee** — To continue to build membership, recruit and engage new leaders, and keep the membership united.

It's imperative that we engage new and potential members post-strike or work action. New leaders are an opportunity to reinvigorate the union. Work with your colleagues to consciously map new leaders by region and local union, especially from grassroots organizations. Offer regional or local events, trainings, or other ways for the new leaders to reconnect after the strike; and learn more about ways to stay involved. New leader engagement is a daily and ongoing piece of the work.

Many states offer regional or statewide leadership conferences — make sure to personally invite new leaders and, better yet, feature them in a prominent way within the event. In Arizona, AEA offered “Prioritizing New Leader Development” at their Summer Institute following their strike. They also offered a political boot camp immediately following the strike and saw their political engagement increase by 80% within the membership. Or encourage a local union to share their strike story within their region to bolster other local unions facing a strike build up. The peer-to-peer connection can inspire other educators in powerful ways.

Most states maintain a statewide political action program. Try to involve new leaders in the next political cycle in ways that match their interests and demonstrated skills. New leaders often do not know how to engage in their union, so match their interests with opportunities and maintain a relationship with them to keep them connected to their union. As the strike work winds down, research who actively led social media efforts by using data collected during the campaign. Map out their locations, membership status, and local leadership connections.



## **Rebuild Labor-Management Relationship**

Strikes are among the most contentious moments between the union and the employer, or the union and state decision makers. Yet, there are no divorces in labor relations. We can work to change elected officials on school boards and in state legislatures and the Governor's office, but that is slow work. In the meantime, we must move from an adversarial experience to one of productivity to implement the terms of the new contract or policies. We must also acknowledge that power dynamics between the union and decision makers may be different and take time to reshape after a strike. Local leaders need to adjust to more assertive roles compared to their past position with the employer. Employers may need to adjust their assumptions on how they work and treat union leaders.

Find common issues you can collaborate on with management, so you can both get back to a proactive problem-solving relationship. This work can include forming equity teams, committees on more inclusive hiring practices, coordinated outreach committees on school construction bond committees, etc. These opportunities also provide the union a chance to draw in more new leaders. Initiate or renew commitments to hold monthly meetings with

administration that discuss matters of mutual interest. Encourage local building representatives to do the same with principals.

### **Rebuild Relationships with Impacted Staff**

We cannot predict how other staff outside the striking bargaining unit get treated during a strike. Ideally, a local union proactively reached out and prepared non-striking staff for what could happen during the strike and offered multiple ways to support them during the strike.

### **Rebuild Relationships with Dissenters within the Striking Staff**

Members will be returning to a school or worksite and need to work productively together as colleagues. It is important to intentionally work on reconnecting with all colleagues regardless of whether they voted against the strike, crossed a picket line, criticized the union's strategy, or did not participate. At minimum, be civil and professional. Members or non-members who intentionally crossed picket lines to protest the strike and union may continue to carry this stigma for years. Try to help the local union reach these folks in particular to make sure any ill-will or division does not grow in the buildings after the strike due to the negative opinions or critiques of the union held by these individuals.



### **Focus on Political Action to Change Decision-Makers**

Political action can be powerful on a local level, especially within school board election races. State legislatures fail to reflect the diversity of their districts, and yet they make critical decisions on state education funding and statewide education standards.

Our members can do more to engage in the political system. It often begins with education and learning about ballot access, local election cycles, state election cycles, and the legislative process. Political education can inspire members to engage in new ways on a local and state level, including actively recruiting pro-labor and pro-education candidates, working on campaigns, and then holding elected officials accountable on key labor and education votes. A strike can be a catalyst for increasing members' political activity because they experience a highly political and personal experience through the strike. If unions proactively and quickly help to connect how political decision makers directly influence bargaining/education policy to how organizing can improve outcomes, we can mobilize more members to get political.

### **Continue to Build Connections with the Community and Thank Them**

Ideally, new connections emerged between the union and parents and the larger community during the strike. Moving forward, find ways to continue to build on these relationships. For universities, continue to build relationships with students through student organizations. What do our partners think is needed to create even stronger schools and universities? For many unions this is new territory, but many of our members already engage within their communities and local organizations. Ask them to serve as a formal liaison between the union and organization to establish an ongoing relationship. This step can be a way

to further engage marginalized communities (ethnic, racial, and linguistic minorities) who are often distant from traditional union leadership. It also allows the union to more easily learn when and how our solidarity can help a community organization or neighborhood in need.

The union should work to heal rifts created during the strike within the community and assist students reconnect with their academics. Even a simple effort to thank the community for their support during the strike can go a long way, which can be done with a free meal or visible expression of thanks. Explore ways to turn the relationship into a long-term one, where the union supports the community's needs as much as the community helps the union. Find the right organizing issues that create a common cause. We collectively build a movement when we show up for each other's causes in authentic and meaningful ways.

Consider these community outreach tactics:

- ✓ Host a free community dinner or pancake meal for the community
- ✓ Organize a rally, or honk and wave across town with signs saying "thank you"
- ✓ Host a "future of our local schools" forum
- ✓ Develop regular communication from the union to the community. Highlight programs and accomplishments of staff and students, and connect staff and families
- ✓ Invite individuals into the school, classroom, or university
- ✓ Reach out to local media to feature positive stories about the school/university
- ✓ Develop relationships with other unions after the strike. Learn about their issues and struggles. Show up in solidarity with a critical mass of members
- ✓ Form a "Friends of Education" group, if it doesn't exist already
- ✓ Attend community events with a union banner for visibility and do community service. Be visible all the time
- ✓ Offer scholarships for students
- ✓ Do not rely on running ads or passive communication with community members. These tactics do not form long-lasting relationships
- ✓ Do door to door canvassing after the crisis to connect with communities and learn first-hand about their issues
- ✓ Work on school board elections
- ✓ Transition the crisis committee to a community outreach team
- ✓ Move members and allies into political work like a petition gathering effort, state referendum mobilization, or election work

### **Prepare for Political Backlash**

Our opponents look for every opportunity to weaken the labor movement and often use strikes as a rallying cry to disempower unions. For example, in Vermont, every time a local union strikes, a handful of anti-labor legislators propose legislation to remove the right to strike from state law. Employers and/or elected leaders have also attempted to pit working people against each other by creating false narratives that an increase in salary for teachers, caused a budget shortfall for essential services for low-income people. In West Virginia, the state threatened to cut Medicaid to pay for teacher raises. We can expect retaliation and anti-labor tactics, so we must be prepared to expose the anti-union rhetoric and proactively show up on broader issues for all working people.



# CASE STUDIES

## ORGANIZING SUCCESS STORIES

### TRADE SECRETS:

- 1.** Challenge assumptions.
- 2.** Acknowledge the traditions that add strength while exploring opportunities to grow stronger.
- 3.** Make the most of your circumstances and culture — even rural organizing has its advantages.
- 4.** Constantly assess ways of improving the union's leadership and structure.
- 5.** Take time to build internal and external capacity in advance of a contract crisis.
- 6.** Build solidarity by building relationships.
- 7.** Make room for new leaders to make decisions.
- 8.** Members should own the work as much as staff.
- 9.** Use multiple and consistent methods of communication with members.
- 10.** Trust democratic decision-making.
- 11.** Remember to tell the stories of members.
- 12.** Recruit members during the campaign.
- 13.** Educate potential members on the value and role of the union.
- 14.** Members can organize while building up the crisis campaign on a short timeline.
- 15.** Strike experience and know-how is not necessary to win a fight using a strike.
- 16.** Make sure to use a settlement checklist to clarify all major issues, especially wages/salary during strike days and non-reprisal language.
- 17.** Statewide actions can greatly increase member engagement.

## Paraeducators Strike Secures Wage Increase

### Port Angeles, Washington

#### Run-Up:

After a State Supreme Court decision directing the state of Washington's government to allocate new money to educator salaries, worker associations began to bargain for better pay. Representing the lowest paid workers in the school district, the Port Angeles Paraeducators Association (PAPA) launched their campaign in March 2018, six months out from the expiration of their fifth single-year contract with the Port Angeles school board. Unable to reach a new agreement, the 113-member bargaining unit went on strike.

#### Organizing Effort:

PAPA focused on earning greater respect for paraeducators by explaining the value of their work to the school district. Their efforts included:

- ➔ Activating parent allies by releasing video footage of the board's bad behavior, which exposed the true cause of the tensions between the board and the association;
- ➔ Robust outreach effort to educate parents about the school board's unfair treatment of paraeducators compared to the teachers;
- ➔ Solidarity with the teachers helped raise awareness, build support and secure a settlement for teachers without a strike; and
- ➔ Persuading all the known substitutes to not to cross the picket lines after the district threatened to replace them.

#### Success:

When schools were forced to close, during PAPA's two-day strike in November, the board agreed to provide more opportunities and higher compensation to paraeducators.

#### Strategic Considerations:

Northwest of Seattle, Washington, the Port Angeles School District serves about 4,000 students attending 8 schools in the City of Port Angeles and the surrounding rural areas, including the Lower Elwha Klallam Tribe. About 74% are white, 8% are Hispanic and 4.5% are American Indian/Alaskan Native; 60% receive free or reduced lunch. PASD's 5-member School Board oversees an annual budget of \$48 million.

In Washington, local unions often align crisis build ups and potential strikes to overlap with the opening of the school year and the expiration of contracts — most expire at the end of August. At the time, many ESP units did not go out on strike and PAPA was dissuaded from doing so by the state affiliate because they only represented a small group of paraeducators. But by 2018, the Supreme Court's decision coincided with a political shift around member organizing and the hiring of a new human resources director had put a strain on labor relations.

## Teacher Walkout Wins Pay Raise

### Arizona

#### Run-Up:

Arizona educators were fed up with being at the bottom of national rankings on school funding, salaries and other issues, in addition to losing resources to charter school vouchers used by 17% of students (over 3 times the national average). Facing a \$952 million shortfall in the Governor's budget proposal, educators began engaging in the Arizona Teachers United Facebook group. Expanding their partnership to the broader educator community under one banner, Arizona Educators United (AEU) began laying the foundation for a walk-out, under the guidance of the Arizona Education Association (AEA), in March 2018.

#### Organizing Effort:

AEU and AEA built support for fully funding education at the state level by highlighting the benefits of a great public education system in Arizona. Their efforts included:

- ➔ Calling out the Governor for inadequate funding for school infrastructure, which left students with obsolete textbooks, run-down buildings and high educator turn over;
- ➔ Elevating the value of support staff who were left out of the Governor's proposal;
- ➔ Walk-in Wednesdays in several districts, where educators wore red in their classrooms every week as a show of unity;
- ➔ Community canvasses that collected thousands of commitment cards from parents and community partners, indicating their support for adequate school funding and affirming educators' plan to walk-out if necessary;
- ➔ Coordinated with local organizations, food banks and churches to support vulnerable families in the event of a walk-out; and
- ➔ Democratically deciding on a 6-day walk-out, supported by 78% of the 57,000 educators who voted, starting with a march on the state capitol as well as in-district solidarity pickets by educators who could not make it.

#### Success:

At the end of the walkouts in April, the Governor promised to increase teacher pay by 20% over three years. Association membership increased by 38% among the 48,000 certified teachers and 42% among the 49,000

ESP's in the state. Political engagement also surged from 5,00 door knocks in 2016 to 80,000 door knocks in 2018, leading to victories for pro-public education candidates up and down the ballot.

#### Strategic Considerations:

Across 2200 schools, Arizona educates a million students with an annual budget of \$7 billion, \$3000 less than the national per pupil average. 44% of students are Hispanic, compared to 40% who are white, and



about 56% receive free or reduced lunch. Each of the 217 districts are governed by a locally elected school board and superintendent.

Inspired by West Virginia and Oklahoma, Arizona joined the national #RedforEd organizing wave. Lacking familiarity with organizing large-scale campaigns, they turned to AEA provided for strategic support and assistance with leadership structure, regional coordination, and member contact information systems. Holding off on any major membership push in the build-up, hoping that educators would see the value in spurring various actions leading up to the walk-out. Then, during the walkout, organizers found success with recruiting educators at local site tents by explaining the need to continue organizing in the future.

## **Long-Term Organizing Leads to Lasting Reform**

### **Los Angeles, California**

#### **Run-Up:**

After years of austerity measures underfunding California's public schools, growing tensions with the Los Angeles Unified School District (LAUSD) board led the United Teachers of Los Angeles (UTLA) to form a labor-community coalition called Reclaim Our Schools L.A. in 2015. The 2017 election ushered in a take-over of power from pro-public-school leadership by pro-charter school members. Despite a \$1.86 billion reserve, the board rejected fact finder recommendations and refused to bargain with UTLA over several proposals related to ending the school to prison pipeline and protecting undocumented students and their families, which culminated a strike in 2019.

#### **Organizing Effort:**

The coalition's 18-month campaign centered on investing in public schools and community centers instead of charter schools. Their actions included:

- Integrating political and organizing work into the traditional service work, using contract action teams (CATs) to train leaders and community members in outreach;
- Learning about member and community interests in addressing education and racial justice — through 31,000 conversations — provided the foundation for a bargaining platform, which included a range of classroom and compensation issues;
- Parent-teacher liaisons that were key to building a strong outreach effort that ranged from leafleting parents and gathering signatures to interactive virtual town meetings and demonstrations in board meetings and outside board member homes;
- "Action Schools" that were parent-led actions to pressure board members to settle;
- Using ArtBuild to encourage local artists to design images for signs and banners used during protests as well as chants like, "Who's Strike? Our Strike!";
- Solidarity pickets at 900 schools each day, ending with a unified action that conveyed their focus and collective power; and
- Social media efforts to break down complex issues into digestible content and feature videos, memes and stories from rank and file voices on the picket lines.

#### **Success:**

The school board's support for community schools created momentum for the 98%-member vote in favor of going on strike. As parents became more engaged, the board lost popularity. In time, UTLA won many

concessions such as ending racial profiling of students. UTLA is also working closely with the state affiliate to push for education funding reform and other proposals for smaller class sizes, increasing support staff in schools, creating formal community schools, reducing standardized testing, and capping charter schools.

### **Strategic Considerations:**

The second largest district in the country, LAUSD serves nearly 700,000 students with a budget of \$7.49 billion. About 73% are Hispanic, 12% are Black and 9% are white; and 81% receive free or reduced lunch. The 1322 school sites are governed by a 7-member board.

Representing 96% of the state's teachers, UTLA's 26,000 members began organizing after years of passive engagement and limited bargaining gains. Members supported a proposal to fund the renewed effort with additional dues by a 30-point margin. Nearly five years of internal work was conducted as part of a long-term campaign, which required the short-term tactic of a strike to advance a bigger, broader vision for public schools.

## **Failed Strike Turns to Future Success**

### **Ferris State University, Michigan**

#### **Run-Up:**

After hosting several meetings to build support and prepare members, under the guidance of the Michigan Education Association (MEA), the Ferris Faculty Association (FFA) went on strike in August 2018. But, the very next day, Ferris State University (FSU) won an injunction from the court ordering faculty to return to work pending the outcome of a hearing over their labor dispute. Instead of giving up, though, FFA members re-doubled their organizing efforts

#### **Organizing Effort:**

By emphasizing the FSU President's compensation package and spending on attorneys, FFA was able to show the community that the 1.5% wage increase that the faculty was seeking paled in comparison. Their action actions included:

- ➔ Pickets on Tuesday, Wednesday and Thursday when they were not teaching;
- ➔ Focusing attention on the whereabouts of the FSU President as a key decision maker with weekly sit-ins at his office, attendance at his events and a no-confidence vote in job performance;
- ➔ Engaging with students by handing out "What the Fact" (WTF) flyers at back-to-school, maintaining a presence at student athletic events, hosting weekly "Thankful Thursdays" events with free food and encouraging alumni to voice their support to the President; and
- ➔ Strong relationships with writers of the student newspaper, regularly sending out press releases and posting to social media platforms, which were distributed to local businesses and community members.

#### **Success:**

After several weeks of the campaign, FFA's relentless and unified persistence pressured FSU to return to the bargaining table. With more favorable dynamics for a settlement, FFA's 10-member organizing committee negotiated a 5-year contract that came with significant wage increases and no major concessions on behalf of their 370 faculty members. In the short time following the strike, membership in the association increased by nearly 4%.

### Strategic Considerations:

Located in Big Rapids, 14,000 students attend Ferris State University, the 9th largest university in Michigan. The President and 8-member Board of Trustees, who are appointed by the Governor, oversee the schools \$211 million budget and \$40 million endowment.

It had been many years since the three strikes that FSU previously witnessed until the fall of 2018 when FFA began organizing. Despite some initial setbacks in preparation and the court injunction, they rose to the occasion by expanding their capacity and expanding their campaign. While tensions remain between the administration and the faculty, members are far more united with each other and with the community. They continue to solidify their bond with students through “Thankful Thursday” events every spring before they leave.

## Community Coalition Stands in Solidarity with Educators

### Pueblo, Colorado

#### Run-Up:

The Pueblo school district (D60) board had amicable relations with the Pueblo Education Association (PEA) and the Pueblo Paraprofessionals Education Association (PPEA) until the 2008 economic collapse. Failing to fully fund schools for almost a decade resulted in high turnover, a multi-year pay freeze and significant resource cuts. After 3 years of internal and external capacity building, 90% of paraprofessionals voted to strike after the board broke with their tradition of abiding by fact finder recommendations to resolve bargaining disputes.

#### Organizing Effort:

Because locals wanted to invest and be able to stay in their communities, the campaign framed their salary and insurance demands around fully resourcing public schools to attract and retain the best educators that students need to succeed. Their efforts included:

- ➔ Membership blitz that included canvassing every building, collecting feedback from members and assembling leadership lists for capacity building;
- ➔ Solidarity activities such as wearing pink on the same day, collaborating with other labor organizations, promoting budget and funding research and organizing walkins;
- ➔ Ensuring students had a safe place to go and healthy food to eat during the strike, which included day camps arranged offered by the Boy Scouts of America;
- ➔ Community support from students, who attended public bargaining sessions and pushed for a superintendent meeting, parents who share information and coordinate participation in meetings, rallies, volunteer needs and donation drives through Facebook, and more than 175 businesses that displayed solidarity flyers and publicly endorsed a fair settlement in a newspaper ad;
- ➔ Pickets and rallies at the administrative offices by day — calling out management for leaving town — and candlelight vigils with faith leaders at their homes by night; and
- ➔ Regular media engagement, from correcting inaccurate reporting to daily social media updates, member features and Facebook Live streams of picket lines, along with translating messaging into Spanish for the Latino/a parts of the community.



### Success:

After rejecting the board's failed attempt to divide them from teachers with a one-time stipend, PEA and PPEA won a settlement that provided significant increase to salaries and insurance contributions as well as excused leave and for strike activities. Following the strike, membership increased by 15% among paraeducators and 3% among teachers.

### Strategic Considerations:

District 60 serves almost 17,000 students in Pueblo, Colorado's 7th largest city, 75.1% of who are minorities (mostly Hispanic) and 78.5% of whom receive free or reduced lunch. A 5-member school board oversees the \$230 million annual budget for 33 school sites.

The Colorado Education Association had little experience with direct action prior to Pueblo educators becoming the first educators to strike in Colorado in over 24 years. #RedForEd actions built up their capacity starting with statewide action at the Capitol, calling for increased funding for public education and protecting the retirement system. PEA and PPEA activated a true labor-community coalition by letting local leaders make tactical decisions, collecting member concerns and demonstrating an understanding of the school systems funding shortfalls, which helped increase support for the strike and boost membership.

## Proactive Planning Pays Off for Teachers

### Burlington, Vermont

#### Run-Up:

The Vermont legislature's health insurance reforms put every state contract on track to expire at the same time in June 2017. Looming over negotiations was the fact that reforms forced teachers to pay for new out-of-pocket expenses and high deductibles. This contract crisis came to head in the fall when the Burlington School board imposed working conditions that disregarded fact finder recommendations for the second consecutive year. In response, the Burlington Education Association (BEA) voted to approve a strike that lasted for 4 days.

#### Organizing Effort:

BEA's appeal to close the achievement gap and build the schools Burlington deserves was underpinned by the themes of transparency with tax dollars, supporting students by fully funding staff positions, time to prepare and collaborate with colleagues, and affordable health care for everyone, including teachers. Their efforts included:

- ➔ Revamping infrastructure and meetings to be more action-oriented;
- ➔ Internal outreach to connect with members, identify priorities and groom leaders;
- ➔ Responding to the 25% teacher turnover by encouraging their replacements to join the campaign and become members of the association;
- ➔ Pre-strike organizing via phonebanks, picket captain recruitment and canvassing;
- ➔ Community and organization outreach ahead for a strike to plan for childcare, by the Boys and Girls Club, and a food drive to support those in need of meals;
- ➔ Coordination with fellow members who were paraeducators as well as food service, bus drivers and custodial and administrative staff represented by other organizations;

- ➔ Regular communication about proposals, legal options, media and upcoming actions via the website and social media updates, informational sessions and press briefings;
- ➔ Continuous visibility, including literature drops, event tabling, meeting with New American communities and lawn sign placement; and
- ➔ Strike days that began with picketing at their buildings and ended with joining together for unity rallies outside of central administrative offices.

### Success:

The board came back with the help of the original fact finder/mediator and relented to much of the members' demands but refused to pay teachers for the 4-days of the strike, which ended up in litigation. Following the strike, BEA membership increased by 5%.

### Strategic Considerations:

Burlington School District, the 3rd largest in Vermont, is home to the state's largest city. 65% of the 4,000 students are white, 14% are Black and 12% are Asian; 45% receive free or reduced lunch. A 12-member board oversees the \$88.5 million annual budget for 13 school sites while BEA represents 400 Teachers and 180 paraeducators who work there.

Burlington teachers were the first to strike in Vermont in 1978, but historically limited member engagement to service work. Following several contract disputes, local leaders turned to the state affiliate for support in rebuilding, attending trainings and instituting improved communication systems. After the strike, BEA maintained their connections with the community and other labor organizations. Paraeducators also benefited from the solidarity, but more capacity building was needed after years of underdeveloped leadership.

## ESP Show of Strength Averts Strike

### Burlington, Vermont

#### Run-Up:

After years of friendly labor relations in rural Brandon, Vermont the Otter Valley Unified Union (OVUU) school board assumed that the Rutland Northeast Education Association — Paraeducator and Bus Driver Unit (RNEA — ESP Unit) would not strike. So, they cut off contract negotiations in 2015, leaving support staff without the pay raises needed to cover higher health costs. The RNEA — ESP Unit began mobilizing with the intent to symbolically reject the decision, but with 85% attendance at their meeting, the ESP's ended up authorizing a strike with 82% of the vote without the teachers.

#### Organizing Effort:

Since 80% of members lived in the district, the Unit wrapped their support for affordable health care and living wages around the idea that, "We're your neighbors," which especially resonated when people learned it would only cost .03% of the budget. Their efforts included:

- ➔ More one-on-one outreach, instead of social media campaign, given the rural and close-knit nature of the communities;
- ➔ Recruiting the most respected bus drivers and paraeducators in underrepresented schools to join the organizing team, often adjusting meetings around their work shifts;
- ➔ Mobilized members to attend board meetings and tell their stories;

- ➔ Regular updates via personal emails, mailings, phone calls and handouts in school mailboxes to members, non-members and teachers in the district;
- ➔ Attending local events such as the family-oriented Harvest Festival;
- ➔ Invite the support of community leaders — from faith, business, parent and other labor organizations — including the lieutenant governor hosting a health town hall;
- ➔ Informational pickets, leafleting and phone calls to parents and pro-education voters to talk about their work, the crisis and their need for support; and
- ➔ Avoiding substitute workers by getting teachers to reject additional duties and half of the bus-drivers to agree not to cross the picket lines.

### Success:

In the end, a federal mediator intervened. The union and the district signed a settlement two days before the strike date. Staff won a decent wage increase and a fair split on employer-employee out-of-pocket expenses, including a debit card that workers could use for upfront health expenses. Membership in the association increased by 9% during that time.

### Strategic Considerations:

In rural Brandon, Vermont, the OVUU School District serves 1300 students across 8 towns; 95% are white and 40% receive free or reduced lunch. The 13-member board oversees the district's \$22 million budget for 7 school sites. The RNEA — ESP unit represents 100 paraeducators and bus drivers.

Until this point, no ESP association in the state had ever gone on strike without the teachers. Organizers had to reconcile the diverging interests between paraeducators, concerned about rising health costs, and school bus drivers, not covered by the insurance plan and less likely to be members. Meanwhile, teachers initially kept their distance to avoid retaliation from the board, but eventually became supportive. Despite a decline in engagement and membership after the campaign, due in part to the Janus decision, the full board relented to the association in their next round of bargaining.

## SUPPORT AND RESOURCES FOR STRIKING AFFILIATES

NEA's Collective Bargaining and Member Advocacy Department (CBMA) can offer support and resources to affiliates that are planning a strike or that are on a strike.

### Bargaining Support

#### *Strike preparation, bargaining proposals, and costing*

CBMA staff are available to review bargaining proposals and help develop contract language, including strike specific contract language (e.g., non-reprisal, back pay). Staff are also available to help construct and reconstruct salary schedules, create spreadsheets to cost salary proposals, analyze and develop health care proposals, and assist with strategic and tactical planning (e.g., bargaining platforms, open bargaining).

#### *Collective Bargaining Website and Databases*

CBMA maintains a database of affiliate bargaining agreements, affiliate model and sample contract language, and a host of resources on topics related to and addressed through collective bargaining, including bargaining for the common good, ESSA, community schools, state bargaining law summaries, as well as salary, health care, and pension information. Access to the database is restricted to NEA and affiliate staff.



Members may be granted access under limited circumstances and for a finite period.

Below is website link. The registration includes two steps, signing up and then a verification email with a link is sent to your email. Please check spam or junk folders for this verification email if you do not get it.

[www.neacollectivebargaining.org](http://www.neacollectivebargaining.org)

### *Training*

CBMA offers bargaining training to affiliate staff and members. Bargaining training cover topics such as writing contract language, open and transparent bargaining, and bargaining for the common good.

## **Legal Services**

### *Association Professional Liability (APL) Program — Legal Defense Funding Provided by NEA*

The NEA will provide limited funding for criminal defense representation of association officers and staff when charges stem from authorized association activity. This funding is arranged between the state affiliate and CBMA. The APL Program may also provide limited legal defense funding in defending a strike related suit for damages or ULP. Contact your state affiliate APL Program coordinator for additional information.

### *Association Professional Liability (APL) Insurance Policy — Liability Insurance Coverage for Damages provided by Insurance Company*

The APL insurance policy indemnifies members and associations for damages (monetary losses) resulting from a protected strike. Attorney and other legal defense costs are not considered damages and are not covered under the insurance policy. Damages arising from an illegal strike are not covered under the insurance policy. Contact your state affiliate APL Program coordinator for additional information.

### *Unified Legal Services Program (ULSP) - Legal Funding Provided by NEA:*

The NEA Unified Legal Services Program (ULSP) provides legal defense funding to state affiliates in support of: (1) a member facing discipline by his or her employer for the member's participation in a strike; and (2) an affiliate defending against a suit seeking injunctive or other administrative relief for its support of a strike. Contact your state affiliate's ULSP coordinator for additional information.

## **Other Support**

### *Reporting strike activity to CBMA*

State affiliates should notify CBMA of any affiliate that has voted to authorize a strike, served a notice of an intent to strike, or set a potential strike date. Such notification should include the State and local affiliate's name, the size of the bargaining unit, the local president's name and personal email address, the unresolved issues, and the start date of the potential strike.

### *Letter of support from the NEA President*

A request by a local or state affiliate for a letter of support from the NEA president for members of a striking local needs to include the name and personal email address for the local president(s) and the name, position, and contact information for any person(s) it would like to be copied on the support letter.

### *Connecting with other state and local affiliates for support*

CBMA staff can connect affiliates with locals and staff with strike experience to offer insights, share best practices, and describe challenges.

### *Support from other NEA centers and departments*

CBMA can also connect affiliates to other NEA departments and centers for additional support and resources (e.g., on-the-ground organizing, communications, messaging, community engagement).

### *Student-Centered Bargaining and Advocacy Grants (SCBA)*

SCBA grants, which are administered by CBMA, have been awarded to affiliates to support student-centered and common good bargaining campaigns. These grants have provided financial support to several locals whose bargaining campaigns have culminated in strike or near strike situations.

# ONLINE ADDENDUM

The online addendum resources can be found at [www.neacollectivebargaining.org](http://www.neacollectivebargaining.org), in the Bargaining Resources section.

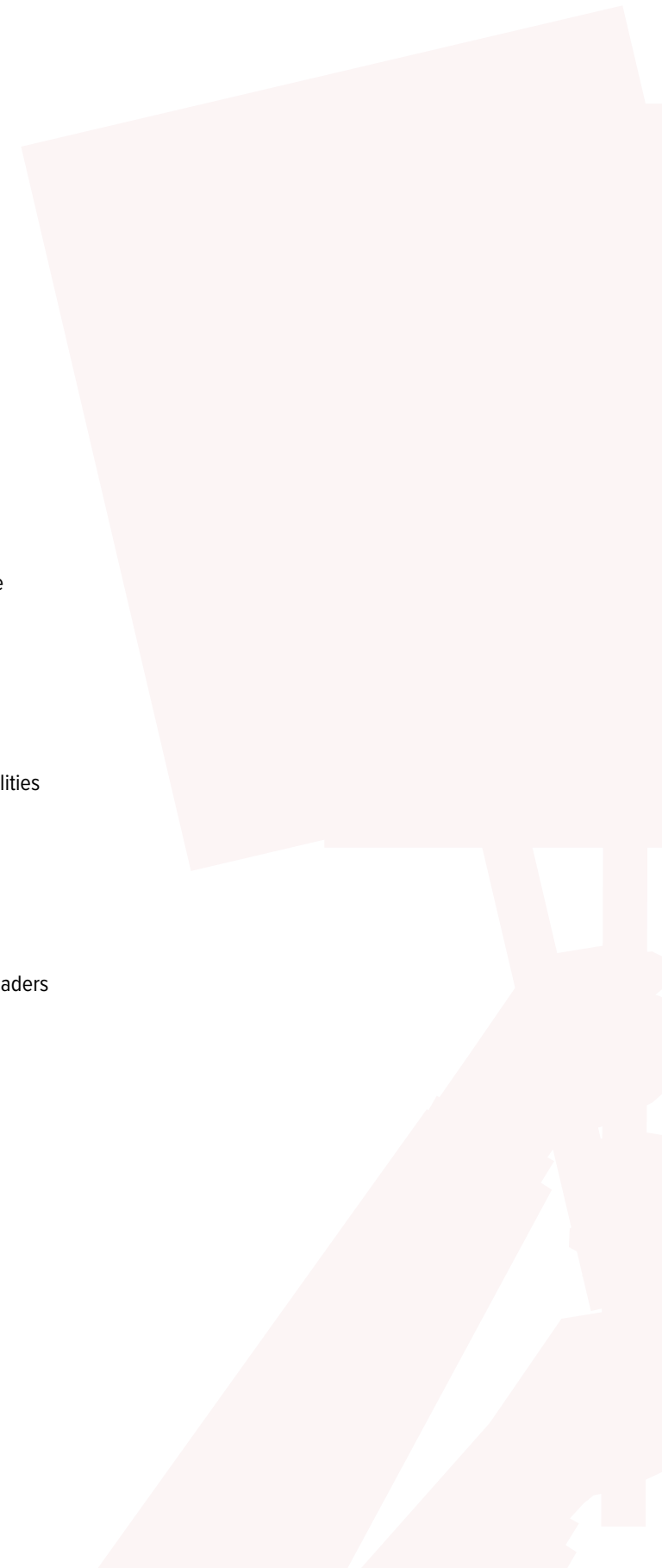
## Chapter 1

10 Minute Meeting Agenda Crisis Buildup Sample  
10 Minute Meeting Agenda during Bargaining Sample  
Bargaining for Common Good Proposal Examples  
Bargaining Glossary VTNEA  
Bargaining Power and Climate Assessment Tool  
Bargaining Roles and Responsibilities  
Checklist for Choose an Issue  
Community Organization Mapping Tool  
Community Power Mapping Activity  
Cornerstone Power Mapping Tool CSBS  
Crisis Roles, Checklists and Tactics Sample Handout VTNEA  
Employer and Board Assessment Tool  
Evaluating an Organizing Issue Labor Notes  
Finding a Good Organizing Issue Labor Notes  
Governance and Staff Roles and Responsibilities JCEA  
Hierarchy of Choices for Campaign Planning  
How to Use MiniVAN CEA  
Local Assessment Tool OEA  
Local Self-Assessment Manual OEA  
Member Community Network Mapping Tool  
Membership Blitz Organizing Packet  
NEA Early Enrollment Campaign Action Guide 2019  
NEA Ed Summer Campaign Planning Template  
Power Mapping Tools  
Self-Leadership Analysis Tool VTNEA  
Statewide Action District Roles and Responsibilities  
Student Body Information Assessment Tool  
Tactical Planning Worksheet  
VTNEA Montpelier Schools We Deserve Statement

## **Chapter 3**

AEA Statewide Press Release Example  
Area or Regional Coordinator Role and Responsibilities  
Aurora, CO Press Release re Community School Example  
Bargaining Legal Pre-Strike Questionnaire IEA  
Bellevue College Press Release Example  
Boycott Tips  
Building Assessment Pre Strike  
CEA Pueblo Press Release Example  
CEA Pueblo Press Release Strike Announcement Example  
Centralia, CO No Confidence Press Release Example  
Coalition Building Tips  
Communications Liaisons Role and Responsibilities  
Community and PTO Pre Strike Communication Example  
Community Organizing Training Manual MEA  
Community Outreach Liaisons Role and Responsibilities  
Community Phonebank Script Sample VTNEA  
Crisis Committee Chair Role and Responsibilities  
Creditors Letter Sample  
ESP Strike FAQ for Teacher Sample VTNEA  
ESP Strike FAQ Sample VTNEA  
Gantt Chart Example MEA  
Health Insurance and Benefits Guide IEA  
Higher Ed Contact Student Teacher Letter  
Informational Picket Tips  
Know Your Rights Walk Out Sample AEA  
Koffee Klatch Tips  
Last Day of Work Instructions Local Union Sample VTNEA  
Last Day of Work Instructions Statewide Sample AEA  
LAUSD Family Resource Guide for Strike  
Literature Drop Instructions  
Literature Drop Pre Strike Sample VTNEA  
Local Bargaining Update Pre Strike Sample WEA  
Local Notice of Intent to Strike Sample  
Logistics Liaison  
Media Access Pro Cons  
Media Relations Tips  
New Member Talking Points on Strikes  
North Thurston, WA ESP Strike Press Release Example





Oakland EA Member Strike Toolkit  
Organizational Readiness Checklist WEA  
Parent Support Card  
Picket Captain Role and Responsibilities  
Picket Captain Training Manual WEA  
Picket Line Instructions  
Pre-Strike Membership Assessment  
Probationary Teacher and Strikes Sample VTNEA  
Pueblo Strike Press Release Example  
Rally Logistics Checklist  
Research Lead Role and Responsibilities  
Scab Company Huffmaster Lit Drop Flyer OEA  
Scab Company Huffmaster One Pager OEA  
Speakers Bureau Tips  
Statewide Action District Roles and Responsibilities  
Statewide Phone Tree  
Statewide Walkout Community Canvass Script Sample  
Statewide Walkout Talking Points Sample  
Statewide Walkout Ballot Sample AEA  
Statewide Walkout Notice to District  
Strike General Role and Responsibilities  
Strike Headquarter Logistical Needs  
Strike Headquarters Coordinator Role and Responsibilities  
Strike Informational Meeting Agenda  
Strike Solidarity request Email Samples  
Strike Vote Meeting Tips  
Student Teacher Talking Points re Strikes  
Substitute No Work Request Sample VTNEA  
Summary of Strike Organization Roles for Staff and Leaders  
Summer Crisis Organizing Guide VTNEA  
Tactics Manual WEAC  
Teacher Strike FAQ for ESP Sample VTNEA  
Teacher Strike FAQ Samples  
Truth Booths Tips  
UTLA Community Support Card  
UTLA Member Strike Handbook  
UTLA Member Strike Letter for Loans  
UTLA Parent Support List Building Sign Up  
Vote of No Confidence Tips  
Worksite Strike Assessments

## **Chapter 4**

Chant Examples

Child Care Coordinator Role and Permission Form

Community Flyer Example San Juan WEA

Daily Picket Captain Report

Daily Strike Newsletter — On the Line — How To

DCTA Labor and Community Solidarity Tracking

Member Talking Points on Strike Burlington Example

On Strike PTO and Community Communication Example

On Strike Solidarity Email Request Denver Sample

On the Line Examples

Picket Line Incident Procedure and Report Form Return to Work MOU Example #1 WEA

Return to Work MOU Example #2 WEA

Strike Picket Line Instructions

Strike Picket Sign Slogans

Strike Picket Team Spreadsheet Burlington Example

Strike Schedule Agenda and Assignment Denver Example

Strike Settlement Guide IEA

Strike Support Volunteer Schedule and Roles Denver Example

Teacher Strike ESP Phone bank Script Example VTNEA

VTNEA Strike Loan Application Form

## **Chapter 5**

Denver Spike the Ball Messaging Example

Leader and Picket Captain Debrief Agendas

Post-Strike FAQ for Member MEA

Post-Strike Member Advice Memo

Seattle Large Urban Debrief Agenda Sample



[www.nea.org/C40](http://www.nea.org/C40)  
[www.neacollectivebargaining.org](http://www.neacollectivebargaining.org)

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