



Building OEA's Membership from the **First Hello**



Strategies for Organizing an Effective
New Employee Orientation



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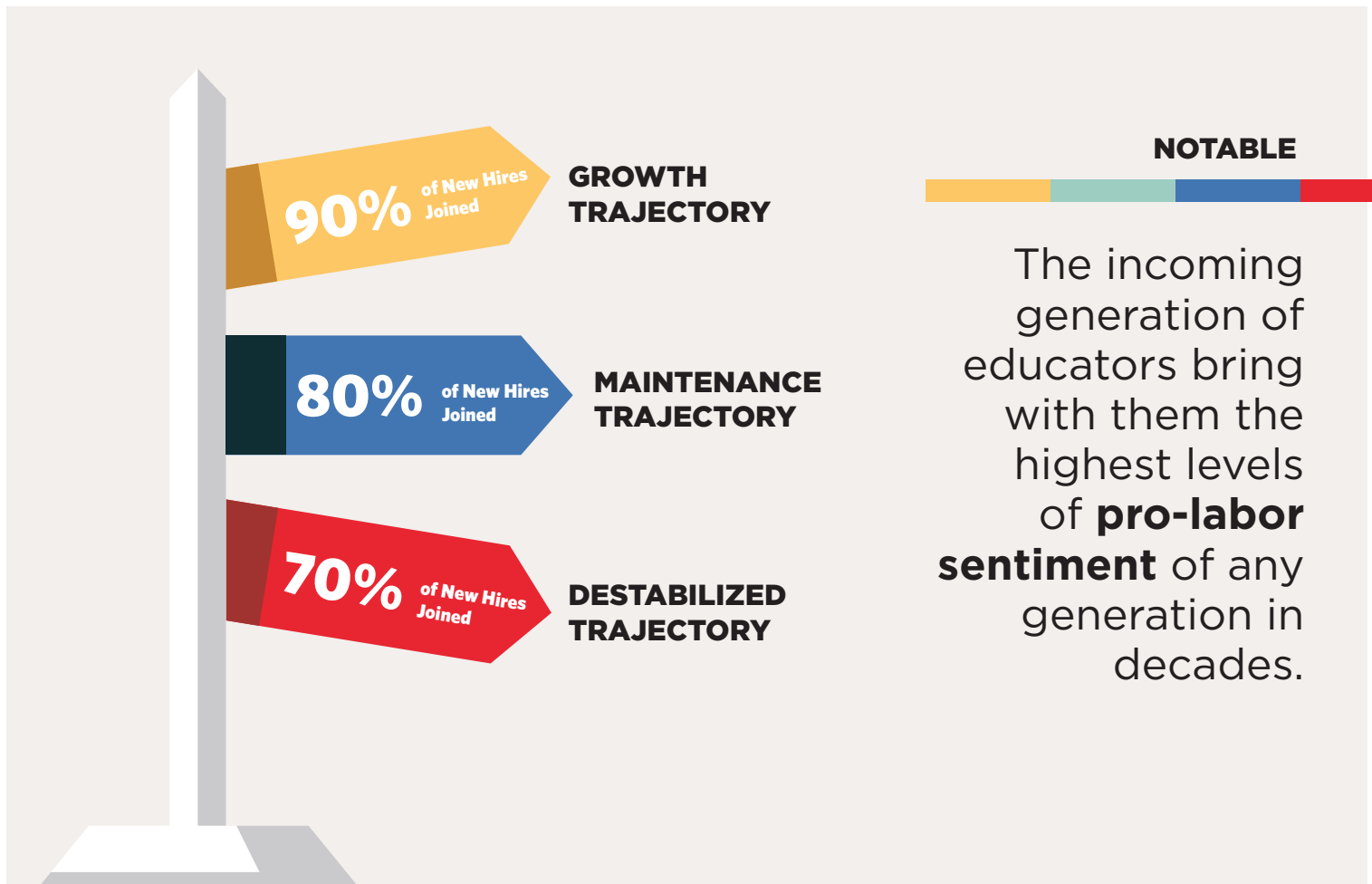
The recruitment of new union members is a year-round effort.

The material in this guide is intended to focus on a particular aspect of that year-round effort: the “back-to-school” season, the heart of which is **new hire recruitment**.

New hire recruitment is often centered around a fall “New Employee Orientation,” or “NEO,” and this guide will reflect that reality. However, attention must be paid to ongoing efforts made after the NEO to connect with new hires, as well as the reality that many employers experience substantial hiring throughout the year and may have many “NEOs”-- even monthly.

A review of NEA data nationwide reveals that new hire recruitment numbers are a leading indicator of the health of a Local Association. This correlation between new hire recruitment figures and organizational health can be summarized as follows:

There is reason to be hopeful. The information contained in this guide reflects the learnings from our own Local Associations in Oregon and the best practices learned from education unions around the nation. Furthermore, the incoming generation of educators bring with them the highest levels of pro-labor sentiment of any generation in decades.



2a. Membership Committee

Year-round membership recruitment of new hires is too important to your Local Association's health to be an afterthought. Each Local Association should assemble a dedicated Membership Committee led by a Membership Chair who ideally liaises with their Executive Board. The Membership Committee will function best if it meets monthly to review new hire and potential member trends for each worksite. The Committee also serves as a point of contact for the Statewide Organizer (an OEA staff person) to provide support for membership recruitment efforts.

If you do not have a Membership Committee it is recommended that your Executive Board fill that gap by developing and maintaining a year-round membership plan. The Executive Board should also review membership data on a monthly basis to keep the plan on track.

The work of recruiting new members is truly continuous. Beginning in December of each year, members may begin announcing their intent to retire. The committee should review School Board minutes each month and highlight any personnel changes that are announced and/or approved. This information helps create a picture of what positions will be filled in the coming year. It is important to have this

picture, because your recruitment efforts are most impactful when you enlist people in similar positions to participate in your New Employee Orientation event.

An additional function of the Membership Committee is to assemble and support a Welcome Team. The Welcome Team can borrow members from the Membership Committee itself, subject to the considerations in the next section. The Membership Committee is a year-round body focused on "steering the ship," whereas the Welcome Team is the face & voice of the New Employee Orientation.

For example: If the football coach and math teacher of 25 years retires, you can expect the employee to hire either a coach, or a math teacher, or ideally someone who would do both. Therefore you will need to recruit a union friendly athletics coach and a math teacher to be a part of your Welcome Team.



2b. Welcome Team

While membership recruitment of new hires and other potential members is a year-round affair, most Local Associations will need to put significant energy into establishing a strategic team for the fall New Employee Orientation(s). As we now have substantial midyear hiring statewide, members of this Welcome Team can be called upon for each subsequent New Employee Orientation (NEO) throughout the year.

When creating your team to welcome and support new employees, it is important to recruit a team that looks, sounds, and acts like your new employee population (as much as possible). This is a time to elevate Early Career Educators (educators in the first 5 years of the profession), their involvement in your Local Association, and their voices. Be intentional with whom you invite to be a part of your Welcome Team. Ensure that you have representation from every level (e.g., elementary, middle, high school) and specialized population groups or assignments, particularly those who you expect to be hired this cycle (School Psychologists, SLPs, Social Workers, Special Education Facilitators, etc.).

We know that not all union members are interested in advocacy and bargaining. Some members may be interested in welcoming new employees, creating relational connections, and connecting interests to union entry points. Keep this mind as you build your Welcome Team.

Making connections and having relational conversations is vital; data goes hand in hand with that process. Each Local Association needs to create expectations around data entry for each interaction with new hires, including where you store this information and who has access (view or edit) to this information. Your Membership Committee—or the team who has taken on this work—should decide how you will store and update your data for Potential Members (PMs). Do not store contact information in a non-secure place such as a Google Sheet with link access.

Fields that you should track include:

- Potential Member Name
- Date of each 1:1 conversation or outreach
- Information shared with the PM
- Information learned about PM's self-interest
- Result of recruitment conversation
- Hire Date
- Worksite
- Building Rep Committee member assigned to each PM

For ideas, examples, and help with data management or recruitment, please contact your Statewide Organizer (contact information found in the Appendix).



3a. Prep for NEO

Lock in an NEO Date

House Bill 2016 (HB 2016) gives us a right to hold NEO events on paid time with all new hires. We have letter templates to help push employers in setting a date in a timely manner. Your planning will be smoothest if you know this date by the end of the previous school year. For the full text of House Bill 2016 please see the appendix.

Acquire Critical Data

If you have not completed attrition tracking (see Section 2a), then it is critical to meet as a Membership Team in March (after the renewal timeline) to evaluate the personnel announcements that have been made throughout the year. This will help you gain a clearer picture of which job classifications will likely be hired.

You should have access to a refreshed list of all Bargaining Unit Members (people who you represent) every 120 days because of the legislation passed in HB 2016. Additionally, you should have access to the list of all newly hired Bargaining Unit Members within 10 days of their hire date. Please contact your Statewide Organizer, UniServ Consultant or UniServ Assistant for help in accessing these lists.

Establish a Day-Of Tracking System for New Hires

This is the time to create a system to gather data on who is in the room at your NEO. There are many moving pieces in the beginning of a new school year which can create poor data until the dust settles a few weeks into the year. This has often meant that we are lacking a clear picture of who our new hires are, whether they've joined, what worksite they are in, and what contact we've had with them until too late in the fall. You can overcome this common hurdle by collecting accurate and dependable data at the NEO to help guide our immediate follow-up conversations and membership work in the first 30 days on the job.

Some employers have a sign-in sheet for preservice/insertion events. If that is the case, you should create an agreement to share that sign-in sheet after the NEO event. This conversation should also include agreements about fields on such a sheet (name, worksite(s), non-work email, cell, etc.). It is important to have one sign in sheet for the event as attendees will likely not complete a second one. If the employer does not have a sign-in sheet system for these events you need to create your own system for gathering this vital data.



DID YOU KNOW?

The union has a **legal right** to hold New Employee Orientation events on **paid time with all new hires**, thanks to HB 2016 (which OEA helped to pass!)

Visualizing Success

Here are some questions to help your team plan a successful New Employee Orientation (NEO):

- How many tables will be used to seat participants?
- Do you have enough welcome team members to have one at each of those tables?
- Are Early Career Educators a central part of your Welcome Team?
- Have all members of your Welcome Team been trained or retrained (in the past few months) in relational one-to-one conversations and making a relational membership ask?
- Does your agenda on the day of the NEO event include time for Welcome Team members to practice their relational membership ask and their 30-60 second “story of why,” before engaging with new hires?
- How will you visually delineate those who have joined and those who have not during your NEO event (e.g. stickers)?
- What is your data plan to enter and track the information you learn about each person’s interests during and after the event?
- What is your follow up plan for all New Employees after the event?

Best practice is to seat one Welcome Team member per table. If capacity allows, seat new hires grouped by worksite with a Welcome Team member from the same worksite. Another best practice is to station a few “Question Captains” around the room to support Welcome Team members at tables. These “Question Captains” can include the President, Vice President, and OEA staff who are present and can help with an individual who has deep questions when the rest of their table is ready to move on.

Create your agenda for the NEO

Please work with an OEA staff person on your agenda for the day. Some key considerations for an agenda can be found below. It is important to think about what the new hires have already experienced that day and week. Do they need some time to get up and move? How can you keep your presentation engaging? Be intentional about the impression you are creating. This is not a time for a lecture or for war stories that create fear or apprehension.

Select and modify your preferred handout materials

OEA as a statewide organization provides materials to Local Associations to assist in new hire recruitment efforts. It is highly recommended to narrow down the materials that you will use on the NEO to only include the most important documents. Our recommendation is to choose one of the four membership stand alone pieces to use at the NEO event. You may also need to make adjustments to certain materials that are provided by OEA, such as filling out the “BRAG” template with content specific to your Local Association or customizing the generic slide deck for Local Association use.

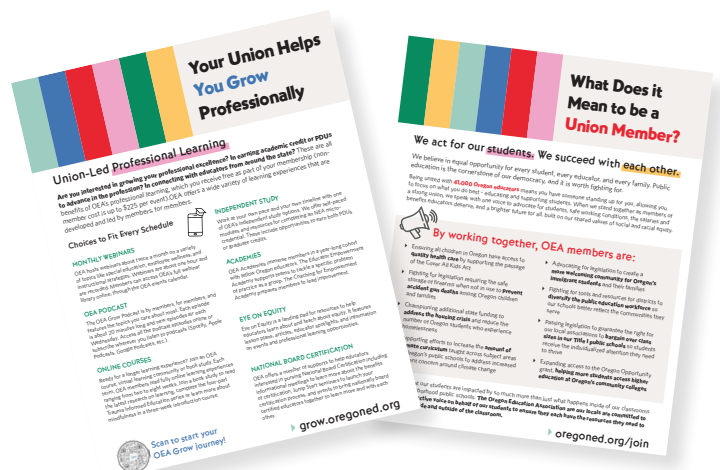
The list of available materials is found in the Appendix.

Train your Welcome Team members

Once you have your team assembled and a plan for the NEO you need to train the entire team on:

- How to have a relational one-to-one conversation
- How to effectively share their story of why their union matters to them (30-60 seconds)
- How to make a relational membership ask
- How to fill out the paper membership form correctly
 - ➔ Demographics
 - ➔ Both boxes checked
 - ➔ Sign and date

Even if your team has done this 100 times, we all need refreshers before engaging in membership work. All participants should be refreshed and retrained before the event.



3b. Outreach before NEO

We know relationships are vital to strong membership, so our goal is to have “no strangers” at the New Employee Orientation event. In order to achieve this we spend time and energy reaching out to New Employees during the summer months. Some ways to do this are listed below. For a more exhaustive list of ideas, check the resources in the Appendix, below. This list is just a jumping off point. Use your team’s creativity! For help with planning or execution of any of these tactics please contact your Statewide Organizer.

Place Welcome Phone Calls or Texts

New hires receive a welcome phone call within their first few days of being hired from the Local Association President, Local Association officer, Membership Chair, or Building Rep. Sample outlines/scripts for this conversation are available from your Statewide Organizer. This work can be done once a week in the summer using HB 2016 data which will show who has been hired in the past 10 days. Use we/us language when placing these calls. For example, “Hello, I’m (name) I’ve been elected by our peers to serve as our union President...”

Tips and Tours

New Employees are given a tour of their future school or worksite by the Building Representative with tips for success given throughout, followed by some social time like a beverage together. Ideally this would happen before their first day in the worksite, but their first week on the job works too.

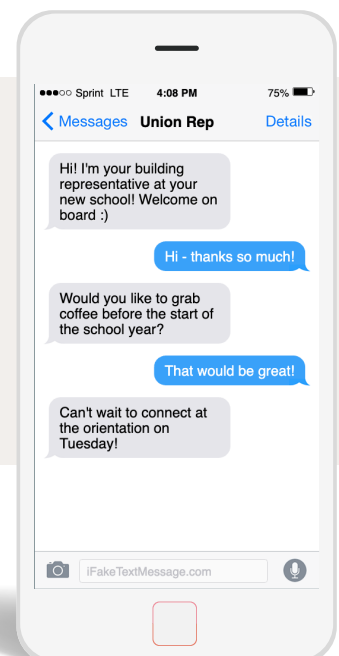
Coffee with the President

New Employees are invited to meet the Local Association President (or Membership Committee, or Executive Board) over coffee. This can be split into different events to keep the group to a manageable size. This event can be held in person at a coffee shop, or participants can be emailed coffee cards ahead of time and asked to bring their beverage to a park or virtual gathering depending on the Local Association’s preference.

For help with planning or execution of any of these tactics please contact your Statewide Organizer.

DON'T FORGET!

New Hires should receive a welcome call or text from their union within their first few days of being hired.



CHAPTER 4

Tasks at the NEO



All materials shared with New Employees should be high-quality, color printed literature. Please see the Appendix for examples, and contact your Statewide Organizer with any questions or requests. Your Welcome Team should all wear Union T-shirts or be wearing the same color to identify them as a part of the team.

4a. Messaging at New Employee Orientation Events

In your physical event space, ensure you will have access to a projector (or check one out from OEA), computer and screen to share a PowerPoint presentation. Design your event to be welcoming, energetic, include giveaways, create small group conversations at table groups and give folks the union contact information for additional questions. Throughout the event, use “we/us” language, be clear what you stand for, own your power, give reasons to join your winning team (use your BRAG sheet from the previous year for ideas). Please also be sure that you have what you need in order to implement the plan you created for gathering attendee data.

For the content of your presentation, please consider the following messages:

Our work matters:

“Our union leads the fight to improve public education in Oregon. Your union membership is a part of strong advocacy to lower class sizes, increase school funding, and improve teaching and learning conditions.”

We're stronger together:

“As individuals, we have a limited impact on decisions that are made in our employers and across Oregon. Coming together as members of a strong union is the best way to have a seat at the table to fight for students and good working conditions.”

We've got your back:

“You never know when you might need your union to advocate for you. Most educators don't think they will ever need help from the union - until they are faced with a schedule that does not honor the right for a 30 minute duty-free lunch, or adequate prep time. Our union protects us as professionals.”

INSTEAD OF THIS...

Feeling apologetic for explicitly asking attendees to join...

Downplaying or overlooking recent bargaining victories (or highlights of your salary schedule)...

Relying on large-group or whole-group time to accomplish all of your goals...

Displaying how dues can be broken down into three “buckets” corresponding with Local/State/National Affiliates...

Apologizing for the cost of dues or over-justifying the amounts...

Having the Local Association President speak the entire time...

Lecturing at the attendees...

Conveying a “union optional” message to attendees...

Telling new hires the benefits of membership...

Harping on the “bad day supports” that union membership provides, such as a lawyer...

Creating space for questions from the audience during whole-group portions of the agenda...

Starting from a place of fear and the need for protection...

TRY THIS!

Communicate how excited you are for new hires to join us in building the schools students deserve!

Brag about your pay & benefits AND the fight to secure them!

Keep whole-group pieces concise and yield to small group decisions!

Discuss total dues, and brag about the power that we have as a union!

Frame dues as fuel for the work of their union in building the profession they want to retire from!

Create space in the agenda for a variety of speakers who represent the demographics of the new hires themselves!

Create a dynamic agenda that incorporates movement and participant input!

Convey the norm & expectation of membership!

Use small groups to ask new hires what is important to them personally, and connect it to union supports and opportunities!

Uplift “every day” supports, such as survival guides for parent-teacher conferences, grow.oregoned.org, and more!

Direct attendees to raise questions at their individual tables for a Question Captain to then support!

Encourage new hires to claim ownership of their Local Association and build the union they want to live their career in!

4b. Making the Ask at NEOs

When it comes time to make the membership ask, have a Welcome Team member at each small table pass out paper membership forms. It can be useful to have pre-filled forms for common fields like employer, Local Association and certified or classified. While people are filling out forms their table presenter should be sharing their “story of why” (30-60 seconds), then take any questions. Have the Welcome Team member check to make sure that demographics are filled out, both boxes are checked, the form is signed and dated.

Once the completed form is collected, the Welcome Team member could give them a sticker to indicate they have signed up. These can be printed on name tag sheets with various phrases “I stand with (insert Local Association acronym)” or “I am (insert Local Association acronym)” etc. People with stickers can stop by the union table for their swag.

For additional engagement and accountability ideas please contact your Statewide Organizer.

4c. Sample Agenda

Here is an example of how your team can sequence the day of the NEO:

1. The Welcome Team meets ahead of any new hires being in the room to practice their union stories and direct membership asks with each other to “warm up.”
2. The team helps set up the room. Remember less is more with paper materials on the table. Test your AV equipment ahead of time.
3. Execute your previously created plan for a sign-in sheet at the NEO event.
4. Welcome Team introductions (name, worksite, employee role, union role using “elected by our peers” language).
5. Your presentation which is either a short PowerPoint (OEA branded and available for Local Associations to update and use) or a short oral presentation about what unions do, and why they matter to your new hires. Share information about your Local Association, victories you’ve had recently (particularly related to pay and benefits), and the value you bring to your community.
6. Small group conversations either in worksite groupings or grade level/assignment groupings
 - Small group presenters share their union story (30-60 seconds) and then go right into making the strong and direct membership ask.
 - Research has shown that bragging about recently won salary and benefits increases is one of the MOST appealing arguments to join
 - Help answer questions, help them navigate the form
 - Help folks fill out the paper membership form, check that all appropriate boxes are checked before folks hand in their paper forms
7. Draw for prizes as groups are wrapping up
8. Share union contact information for additional questions

Are you
ready to
join?



5a. Ongoing Outreach to New Hires

Your NEO is just one contact and follow up contacts are vital to continuing new hire engagement with the union. This is where the work transitions from the Welcome Team to the Membership Committee. Use the data tracking system you created to capture what you learned about your Potential Members to ensure a successful hand-off. Information about their interests, objections, previous experience, and personal story are all relevant pieces to input. Be sure to count the NEO event as a contact in the data tracking spreadsheet and use your sign in sheet as evidence of who was there. Enter the date of the event, if the person attended or not, if they joined and who spoke with them in a small group setting.

Based on this information, adjust the potential members assigned to each Membership Committee member. Then create your follow up calendar if it is not already established. Our goal is to have three union-positive interactions that include a membership ask within the first 30 days of the school year. Align check-in conversations and visits with the interests they have already shared with us. Each interaction is a jumping off point from the previous one, so be sure to update your tracking spreadsheet after each interaction.

5b. Additional NEOs

These events should be scheduled ahead of time (over the summer) for the entire year. You should come to agreement with the employer about the location, time, duration, and other details. Reach an agreement ahead of time with the employer regarding pay for travel time to and from the event (e.g., paid, unpaid, mileage) and that your HB 2016 access rights are honored.

For all NEO events, it may be helpful and strategic to remind new hires that they are being paid for the whole time they are with us.



Concluding Thoughts

Membership and New Employee Orientations can be overwhelming and full of details. Remember to keep your interactions people-centered, and your tone celebratory and excited. **The investments you make at the beginning of a person's career will pay dividends throughout your time together as colleagues and will grow the strength of your Local Association!** We are excited to partner with you on your planning, execution, and follow up for these events. Please reach out to staff and other leaders as we create our best work in collaboration.



Additional Resources

Visit <http://bit.ly/NEOstuff> to access a folder of NEO resources including:

- Organizer contact information and territory lists
- Current membership form
- Dues charts for the coming year
- OEA Branded PowerPoint for Local Associations to download and update with their information
- BRAG (Benefits, Resources, Achievements, Goals) sheet sample from OEA perspective; Local Associations are encouraged to use the available template to update their own
- Engagement idea brainstorm
- Data tracking sheet

Scan for Resources!



MEMBERSHIP FORM

1 YOUR INFORMATION

OEA ID# _____ (For Office Use Only) PM → AC

(Field Use Only)

1-on-1 Group

EMPLOYER LOCAL/CHAPTER

List: _____

PERSONAL INFO

First: _____ Middle: _____

Last: _____

SS #: _____

Worksite: _____

Classified: _____

Ethnicity: _____

Alaska Native/American Indian Asian Black Latinx Multiracial

Hispanic/Pacific Islander Other Please specify: _____ White

Cell Phone: _____ State: _____ Zip: _____

Home Phone: _____

Let's Talk About Membership

BENEFITS

- Trained advocates to support your contract bargaining team as they negotiate your wages, benefits, and working conditions
- Professional representation for issues you experience with evaluation, licensure, and workplace conflicts or discipline
- Legal representation to ensure your due process rights are followed and your professional rights are respected
- Access to affordable liability insurance coverage for civil and employment-related criminal issues
- Free access to all OEA events and professional learning, including year for in-person events

RESOURCES

- High quality professional learning opportunities with Professional Development Units or reduced-cost Graduate credits: grow.oregoned.org
- OEA Foundation grants for students in need oeafoundation.oregoned.org
- Guidance on student loan debt and tools to help you qualify for federal Public Student Loan Forgiveness (PSLF) programs
- Building level representation for any questions or concerns about your local union or district issues
- Access to one-on-one consultations with a staff liaison to the Teacher Standards and Practices Commission (TSPC)

ACHIEVEMENTS

- **EDUCATOR WAGES**
- Won average wage increases of 5% throughout the state at the bargaining table during the COVID-19 pandemic
- Negotiated for one-time recruitment and retention bonuses in dozens of locals throughout Oregon, putting additional money directly in the pockets of educators

CRITICAL EDUCATION INVESTMENTS

- Increased the K-12 budget from \$8.99 billion to \$9.3 billion while protecting revenues dedicated to the Student Success Act
- Secured \$100 million in state funding to address the education workforce crisis, including issues with educator recruitment and retention
- Won additional higher education investments from the state

GOALS

- Advocate for public education funding that meets the unique academic, social and emotional needs of every Oregon student and educator
- Ensure the election of the pro-public education candidates, endorsed by OEA members, in offices ranging from local school boards all the way to the White House
- Continue to build a union culture of year-round organizing and strong local unions in order to elevate the voices of educators in every room where decisions are made
- Intentionally work towards building an equitable, inclusive public education union that recognizes the diverse backgrounds and experiences of Oregon's educators
- Develop a diverse, multimodal approach to communication that intentionally engages all members

MEMBERSHIP FORM

OEA ID# _____ (For Office Use Only) PM → AC

(Field Use Only)

1-on-1 Group

EMPLOYER LOCAL/CHAPTER

List: _____

PERSONAL INFO

First: _____ Middle: _____

Last: _____

SS #: _____

Worksite: _____

Classified: _____

Ethnicity: _____

Alaska Native/American Indian Asian Black Latinx Multiracial

Hispanic/Pacific Islander Other Please specify: _____ White

Cell Phone: _____ State: _____ Zip: _____

Home Phone: _____

I am contributing to OEA-PAC and the NEA Fund (200 single or 1000 member) (ring jointly tax credits)

\$20 to OEA PAC and \$2 to NEA fund per month

\$5 to OEA PAC and \$1 to NEA fund per month

\$10 to OEA PAC and \$2 to NEA fund per month

\$15 to OEA PAC and \$3 to NEA fund per month

\$20 to OEA PAC and \$4 to NEA fund per month

\$25 to OEA PAC and \$5 to NEA fund per month

\$30 to OEA PAC and \$6 to NEA fund per month

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\$475 to OEA PAC and \$95 to NEA fund per month

\$480 to OEA PAC and \$96 to NEA fund per month

\$485 to OEA PAC and \$97 to NEA fund per month

\$490 to OEA PAC and \$98 to NEA fund per month

\$495 to OEA PAC and \$99 to NEA fund per month

\$500 to OEA PAC and \$100 to NEA fund per month

I am contributing to the OEA Foundation (tax deductible)

\$12 per year

\$24 per year

\$36 per year

\$48 per year

\$60 per year

\$72 per year

\$84 per year

\$96 per year

\$108 per year

\$120 per year

\$132 per year

\$144 per year

\$156 per year

\$168 per year

\$180 per year

\$192 per year

\$204 per year

\$216 per year

\$228 per year

\$240 per year

\$252 per year

\$264 per year

\$276 per year

\$288 per year

\$300 per year

\$312 per year

\$324 per year

\$336 per year

\$348 per year

\$360 per year

\$372 per year

\$384 per year

\$396 per year

\$408 per year

\$420 per year

\$432 per year

\$444 per year

\$456 per year

\$468 per year

\$480 per year

\$492 per year

\$504 per year

\$516 per year

\$528 per year

\$540 per year

\$552 per year

\$564 per year

\$576 per year

\$588 per year

\$600 per year

\$612 per year

\$624 per year

\$636 per year

\$648 per year

\$660 per year

\$672 per year

\$684 per year

\$696 per year

\$708 per year

\$720 per year

\$732 per year

\$744 per year

\$756 per year

\$768 per year

\$780 per year

\$792 per year

\$804 per year

\$816 per year

\$828 per year

\$840 per year

\$852 per year

\$864 per year

\$876 per year

\$888 per year

\$900 per year

\$912 per year

\$924 per year

\$936 per year

\$948 per year

\$960 per year

\$972 per year

\$984 per year

\$996 per year

\$1000 per year

I am confirming my understanding and agreement to all of the terms above and my

Date _____



Thank you for your work in building a
stronger OEA.

