**Toolkit for Recruiting and Working with New Hires   
in the COVID-19 Era**

Now, more than ever, strong public-sector unions depend on their members. It is essential to meet and organize prospective members as early as possible. Accessing and maintaining up-to-date information on all employees represented by the local Association is an essential building block to a strong and effective organization. While we may need to make certain adjustments, the basic steps are the same as they were prior to having to do it all online. Remember, we won the right to be present at employee orientations—in person or online ([Orientation Advisory 1](https://drive.google.com/file/d/1LkqTIYGle2oUDnjowSEnAiiyNoz2C7dy/view), [Orientation Advisory 2](https://www.cta.org/wp-content/uploads/2020/07/Orientation-Advisory-2.pdf)) Let’s put those rights to good use.

**1: Acquire Employee Lists**

You may have bargained AB 119 new staff orientation and bargaining unit member list collection language (see [C4OB AB119 Advisory/Materials](https://calta.sharepoint.com/sites/nod/Cloud%20Storage/Forms/AllItems.aspx?RootFolder=%2Fsites%2Fnod%2FCloud%20Storage%2F05%20%2D%20Advisories%20%2D%20Manuals%2FAB%20119%20New%20BUM%20Orientation&FolderCTID=0x012000357BB5F2D9818E4B98C735A003DE9A50) for more details). If so, use it and these additional strategies to build your lists.

* Request/get new hire and bargaining unit list from the district on a routine basis.
* Review school board meeting agendas to identify and verify new hires.
* Create good lists with new hire names, addresses, work location, and personal contact information as folks are hired so that your outreach may begin even before the first day of work.

If you haven’t bargained AB 119 language, it is highly recommended you do so as soon as possible (consult with your CTA primary contact staff person regarding the best timing and approach and refer to the materials noted above for more information).

**2: Prepare and Plan for Orientation**

* *Send* a “Welcome” letter to all new hires from the Chapter President that includes an inspirational vision of the union. ([Sample Welcome Letter](https://www.cta.org/wp-content/uploads/2020/07/WelcomeLetter1v2.docx))
* *Identify* and recruit a team of active members who will be responsible for reaching out to new hires ***before*** orientation. These same leaders may continue connecting with “their” new hires for the year, or the on-going relationship may shift to site reps, union “buddies” or mentors, but make sure no one experiences a one-time, drive-by approach to relationship-building. See these [Organizing Resources](https://www.cta.org/our-advocacy/organizing-and-bargaining/organizing-resources).
* *Train* member leaders on one-on-one organizing conversations and data tracking. (Try this new tool on for size: [NEA New Member Brochure](https://calta.sharepoint.com/:b:/s/nod/ERbDTAnJB4ZMqEaglb2rQk0Belixcdes0CuylvghBroNYQ?e=Lb7a6K).)
* *Initiate* one-on-one conversations, using your team, to create a relationship between the new hire and the Association. Use phone calls, Zoom, or other interactive methods rather than e-mail. You’ll find some useful Zoom backgrounds here: [Leader Zoom backgrounds](https://calta.sharepoint.com/:f:/s/nod/EvCdjOlZXj5MsEPs2M3t_hEBn2h5PQkbD3TCG2c2C6jQgg?e=ymzN5X).
* *Build* a membership ask and data tracking into all events, like orientation, to expose the new hires early on to the union’s commitment to active involvement. Members can join Action Network here: <https://actionnetwork.org/users/sign_up>.

**Sign them up! Ask regularly.**

Members may be signed up using CTA 360 if we meet “in person.” But given our COVID environment, that may not be possible everywhere this year. The CTA 360 app allows local leaders and organizers access into the local membership information in an easy to use app-based interfaced. If you don’t have CTA 360, your president will need to authorize your access and you need to complete a short, on-line training to introduce you to the functions. Find out more and get access at [www.CTAGo.org/CTA360](http://www.ctago.org/CTA360).

Other alternatives include:

**Fillable Enrollment form with Electronic Signature**—this is a fillable PDF enrollment form that does **not** need to be printed to be signed. The potential member would enter their information, check the box at the bottom of the form, type in their name (electronic signature), and email the form to the membership chair or other local leader. The local leader would review the form for completeness, and then forward the original email and attached form for processing to [membership@cta.org](mailto:membership@cta.org), or directly to the chapter’s designated CTA membership person. The PDF form or the link can be forwarded to leaders and potential members. This enrollment form can be found in the Membership Resources section at [www.CTAGo.org/membership/resources](http://www.ctago.org/membership/resources). Click on “Membership Enrollment Forms and Engagement Tools” to find all the fillable forms (Certificated, ESP and CCA) The forms can also be found in the leader resources area of cta.org.

**Paper Enrollment Forms**—there are no changes to the paper enrollment form so you can use the current paper form for new enrollments and simply mail to the potential member after making contact if you can’t “meet” in person. Your local CTA office has forms if you need them. Please ensure the potential member returns the three top copies to the local leader. Then scan the top copy to [membership@cta.org](mailto:membership@cta.org) and take a copy to the district office.

**On-Line Enrollment—**CTA is creating an on-line enrollment form that does everything in one step, all web-based. This form is available now at Join.CTA.org. Soon, we will have a page on [www.CTA.org](http://www.cta.org/) to learn about the benefits and value of membership, click the “Join” link, complete a short form and submit. After completing the online form, the member will receive a welcome email the next day along with a temporary membership card and a link to their enrollment form. The chapter president and staff person will receive a weekly report of all new enrollments with instructions to take the report to the district office to add to the deduction register.

**3: Engage New Hires Before, During, and After Orientation**

* Host a “Welcome to the District” or “Meet Your Association” event for new hires—this may have to be virtual this year – with a union-owned and member-led agenda that is executed by a diverse set of member leaders, including elected leadership, building representatives, worksite activists, and Early Career Educators. The agenda could include talks and activities on contract and district policy highlights, professional learning topics (i.e., types of curriculum and instructional resources and professional development offered by the union, the [Instructional Leadership Corps - ILC](https://www.cta.org/for-educators/professional-development/ilc): [ILC website - see Events and Trainings](https://www.cta.org/for-educators/professional-development/ilc)), local organizing priorities and a plan overview, “what to expect and know on the first days on the job,” a membership ask, and an engagement/activism ask (e.g., come to our first union TGIF gathering—first drink on us…or join us for a First Friday Zoom Hangout…or “will you join me at the upcoming school board meeting to show your support for our planning time resolution?”).
* For Orientation
  + - [Sample Orientation Meeting Agenda Template](https://calta.sharepoint.com/:w:/s/nod/EU0avFwVmHBNghEtCZPtKUkB-0skJIWfWxJ-F21B6gRO2Q?e=uJNdjA)
    - [Locally Customizable Orientation Slide Show](https://calta.sharepoint.com/:p:/s/nod/ET4ytt22xBxIgd3XgVJYcjABYIEWJPcxhSrbiAAqJatXDQ)
    - [Stronger Together video](https://youtu.be/4bRXY3AbhiE)
    - [General Member Recruitment Resources](https://drive.google.com/drive/folders/1ULgtz2QGIgA2NQuyRDu6kLYkboDvASSl)
* Highlight union resources that help new hires access benefits — CTA, NEA, district. ([Member Benefits](https://www.ctamemberbenefits.org/)) The strongest reason, however, is simply to be part of standing together for our students, schools, colleagues, and public education as a whole.
* Share the online enrollment link with potential members as part of the “Ask” – Join.CTA.org
* Invite endorsed vendors to orientations: California Casualty, The Standard, etc.
* Ask recent hires (1-3 years) to share their personal union story with new hires.
* Create classroom management, classroom set-up, or other professional learning events to support new hires. Make them aware there is an Instruction and Professional Development (IPD) department and share the [IPD website](https://www.cta.org/for-educators/professional-development/ipd). Share CTA and NEA resources, [New Educator Weekend (North and South)](https://ctago.org/future-conferences/), webinars, professional learning topics and events, and/or create your own events. Virtual works here, too. For more information, see the new CTA.org event and training calendar: [CTA Events](https://www.cta.org/events/calendar) or [Training Calendar](https://www.cta.org/our-advocacy/organizing-and-bargaining/c4ob-trainings).
* Execute one-on-ones and small group conversations, which can address questions such as “what is a union?”, “why do we pay dues?”, “why are we politically engaged?”, “how do we support professional learning?”, and “why do we care about equity and social justice?” You may consider taking new members on a “ guided tour” of the CTA website using this handy guide: [Get Involved Walk-through](https://calta.sharepoint.com/:b:/s/nod/EWKGHidKA-pKqS1fTDxsdLQB2iof09Sv9zeDI-zYH2YxDQ).
* [Inoculate members early and often](https://www.cta.org/our-advocacy/union-strong) against drop campaigns and efforts by privatizers/anti-union groups.
* Debrief after each interaction. ID who is still not a member and develop a plan to bring those new hires on-board and to further engage and follow up with those who have shown interest/joined.
* Partner with community organizations to offer support to new hires.
* Identify and/or create professional learning opportunities that may be applicable or useful to educators based on their needs and interests.
* In the absence of, or in addition to, a district-run orientation, the union may hold its own New Educator Orientation (NEO).
* Prepare to capture data electronically for each new employee event via a short form that can be filled out on mobile devices or similar easy platform.
* Make sure all new hire information is entered in CTA 360—both members and potential members. Potential member data can be entered easily into CTA 360 or Falcon so when signing up the member later, the process is very fast. Again, make sure to update members and non-member information.

**4: Building a culture that reinforces best practices**

* Create worksite mapping and charting, so the union knows at a glance where new hires are, who are members, who aren’t, what each bargaining unit member’s years of experience is, and what each has identified as his/her/their interests, as well as who is most important to that person at the worksite.
* Prioritize natural leader identification in worksites.
* Provide local leaders, building representatives, and worksite activists with follow-up lists and data.
* Execute frequent check-ins with local leaders, building representatives, and worksite activists to assess and track plan progress, provide support and guidance on overcoming challenges, and distribute updated outreach lists.
* Track worksite conversations.
* Train local leadership and member leaders on New Educator data literacy.
* Analyze New Educator campaign data at the state and local level.

**5: Make Smart Plans Based on Member Interests and Issues**

* Use data to drive decision-making and resource allocation. Data identifies opportunities to develop organizing campaigns, issue-specific education, and professional support.
* Share data reports with local leaders, PCS, and other relevant staff.
* Leverage NEA and CTA resources for data-informed follow-up engagement: [Fundamentals of Organizing](https://www.cta.org/wp-content/uploads/2020/04/C4O-Organizing-Toolkit.pdf).
* Deliver professional support events and opportunities based on data collected from both new and experienced educators. Plan and provide training, support, and organizing based on proven member interest.