Building a Healthy Leadership Team

Name

Local

Leadership Participation and Training

1) Do you know which president council you belong to and when they meet? What is the total number of president councils or county wide union meetings that at least one member of your local has attended in the last year?

2) What statewide meetings and/or trainings has at least one member of your local attended in the last year? Check all that apply. (Leadership Action Program, Leadership Institute Legislative Luncheon, Committee of 100, state conferences and trainings, Representative Assembly, NYSUT committees, Other_____)

3) Does your local train your building reps and activists? If so, how many trainings do you provide per year?

4) When you bring on new union officers, how do you train and support them?

5) How many regional leadership conferences or trainings has at least one member from your local attended in the last 5 years?

Communication

1) Does your local have established forms of communication? If yes, which ones apply?
Email, Phone banks/tree, Newsletter, Facebook, Twitter, Texting, Website, Other

2) How often do you communicate with your members? (Daily, weekly, monthly, as needed)

3) Do you believe your communication with members is (effective, somewhat effective, not at all effective, I have no idea)

4) When does your local communicate with members? (around local issues, state issues, national issues, around the contract campaign, legislative session, professional development opportunities, union activities, grievance updates, other)

5) Does your local rely on the employer's communication model? ie. employer emails, school mailbox, etc.

6) Do you have a set internal communication structure? Yes no

Local Information

1) How often does your local update the list of members?

2) Does the district supply you with a list of unit members? If so, how often?

3) Are you notified of new employees, people leaving the district and drops?

4) Does your local have a list of members' personal emails and or cell phones? If yes, when was the last time you updated the list or checked it for accuracy?

5) Does your local use members.org?

Community Engagement

1) Does your local have a working relationship with other locals working under the same employer? If yes, please list those locals.

2) Does your local have a working relationship with other locals or labor groups outside of your employer? If yes, please list those locals or groups.

3) Does your local work with other organizations or community groups on issues important to your members and the people they serve? If yes, please list those groups.

4) Does your local or your members participate in community and/or parent advocacy meetings and events? If yes does your local promote that participation through social media or local media sources?

5) Has your local ever done a community outreach event (ie First Book, charity fund raising, food bank back packs, etc)?

6) Do you have a list of community and parent groups active in the district?

Governance

1) At this time are all your officer positions filled within your local?

2) Does your local have an up to date constitution? If yes, when was it last amended?

3) Does your local have established committees that meet regularly?

4) Do the union reps and/or building reps meet regularly as a group?

5) On average, what percentage of members attend union meetings? Ratification Meetings? Other informational meetings in your building?

Membership Engagement and Mobilization

1) What does your local do to sign up new employees to your union?—check all that apply

   a. Meets with new employees during orientation

   b. Meets with new employees at a union sponsored event or meeting

   c. Asks reps to meet one on one with new employees at the worksite

   d. Calls all new employees to welcome them to the district

   e. Follows up throughout the year to invite them to union activities

   f. Other _____

2) Does your local have a process for orientating and engaging new members?

3) Does your local provide new members with packets of information about their union? What does that include? (Contract, Member Benefits materials, School Calendar, Tshirt or other union gift, other)

4) Do you have programs and events to engage your members? Check all that apply (Social gatherings, community meetings and events, union sponsored professional development, other)

5) Do members engage in state or national programs or events? If yes, check all that apply. (ELT classes, NYSUT Member Benefits, Share My Lesson, First Book, Read Across America, AFT or NEA conferences, other)

6) Has your local asked your members to take an action (i.e. sign a post card, call a legislators, attend a rally, etc.) in the last year?

7) What percentage of members have participated in at least one action in the last year?

8) Please share with us what actions your local has organized in the last year.

9) Do you have a structure in place to quickly speak with all of your members 1-1? If yes, what is the activist to member ratio? (i.e. 1:10, 1:7, 1:5, other)

10) Has your local organized an action to support your contract negotiations? If so, what was it?

Relationship with the Employer

1) How often does your local solve issues with the employer outside of the grievance process? (never, sometimes, frequently, always)

2) Do you have an established labor management committee or other formal forum that meets regularly with the employer?

3) How many members of the school board can you count on to support union issue votes?

4) Do your building reps meet regularly with their supervisors and/or administration?

5) Does your president meet regularly with your superintendent, dean, president, exec director etc?

Other

1) What are the local dues per member?

2) What percentage of your dues is spent on: check all that apply (organizing, membership meetings, community engagement, contract negotiations, professional development, leadership training, attending state and national meetings, social events, other)

3) Do you have a process or procedure for members that elect to opt out of union membership?

4) Did your local apply for the second vote COPE rebate? Yes, no, what is this?

5) Does your local or do your members participate in local, regional or statewide political events? Please list them.

6) Does your local endorse and actively support school budget votes? Board member elections? State elections?

Six Things

People Need To Know About You To Work

Together Successfully

1. Who you are.

2. What you stand for.

3. What you will ask them to do.

4. What you will not ask them to do.

5. What you will do for them or with them.

6. What you will not do for them.

WHAT IS A TEAM?

Productivity through people. Singapore Management Philosophy

To use teams, and be a team member, you need to know what is and is not a team. Placing people in the same room and calling them a team does not make them one. Aggregates are not groups. To use teams effectively, you first have to know what is and is not a group. To be a team, you first have to be a group. In many cases the concepts **small group** and **team** are used interchangeably in the group dynamics literature, even within the same research study. But not all groups are teams. Teams are just one type of small group. You must know what groups are teams and what groups are not teams. A team is not just a number of people working together. Committees, task forces, departments, and councils are groups, but they are not necessarily teams. Groups do not become teams simply because that is what someone calls them. No matter how often it is called one, the entire membership of any large and complex organization is *never* a team.

A **team** is a set of interpersonal interactions structured to achieve established goals. More specifically, a team consists of two or more individuals who (1) are aware of their positive interdependence as they strive to achieve mutual goals, (2) interact while they do so, (3) are aware of who is and is not a member of the team, (4) have specific roles or functions to perform, and (5) have a limited life-span of membership. Teams can be placed along a continuum according to the amount of collaboration (integration and role differentiation) required. At one end of the continuum are teams such as golf teams, that are composed of a set of individual performers whose individual efforts are combined into a team score. At the other end are teams such as football teams, where division of efforts is meshed into a single coordinated result and where the whole is more than and different from the sum of its individual parts.

A **team** is more than the sum of its parts. A team's performance includes teamwork products that require the joint efforts of two or more members as well as individual work products. Teams not only meet to share information and perspectives and make decisions; they produce discrete work products through members' joint efforts and contributions. The focus is primarily on team accountability. Team members hold themselves and each other accountable for doing high-quality work. For a real team to exist, there must be a compelling team purpose that is distinctive and specific to the small group and that requires its members to roll up their sleeves and accomplish something beyond individual end products.

WORKING GROUPS VERSUS TEAMS

Working Groups	Teams
A strong, clearly focused leader is appointed.	Shared leadership responsibilities exist among members.
The general organizational mission is the group's purpose.	A specific, well-defined purpose that is unique to the team.
Individual work provides the only products.	Team and individual work develop products.
Effectiveness is measured indirectly by group's influence on others (e.g., financial performance of business, student scores on standardized examination).	Effectiveness is measured directly by assessing teamwork products.
Individual accountability only is evident.	Both team and individual accountability are evident.
Individual accomplishments are recognized and rewarded.	Team celebration. Individual efforts that contribute to the team's success are also recognized and celebrated.
Meetings are efficiently run and last for short periods of time.	Meetings with open-ended discussion and include active problem solving.
In meetings members discuss, decide, and delegate.	In meetings members discuss, decide, and do real work together.

Types of Teams

Teams may be classified in an infinite number of ways. Three of the most common are discussed here. One way to classify teams is by the setting in which they are used. Teams are primarily found within work, sports, and learning situations. A **work team** is a set of interpersonal interactions structured to (1) maximize members' proficiency and success in doing their jobs and (2) coordinate and integrate each member's efforts with those of the other team members. A **sports team** is a set of interpersonal interactions structured to (1) maximize members' athletic performance and (2) coordinate and integrate each member's efforts with those of the other team members. A **learning team** is a set of interpersonal interactions among peers of equal status structured to (1) maximize each member's acquisition of knowledge and skills and (2) coordinate and integrate each member's efforts with those of the other team members.

Another way to classify teams is by how they may be used in an organization. Three of the most common uses are as follows:

1. **Problem-solving teams** are teams that meet one to two hours a week to discuss ways of improving quality, efficiency and work environment.

2. **Special-Purpose Teams** are teams whose duties include such things as designing and introducing work reforms and new technology, meeting with suppliers and customers, and linking separate functions.

3. **Self-Managing Teams** are teams of five to fifteen employees who produce an entire product or provide an entire service.

Another view classifies teams in three ways: teams that recommend things, teams that make or do things, and teams that run things.
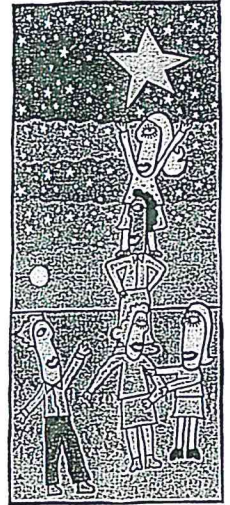
1. **Teams that recommend things** include task forces, project groups, and audit, quality, or safety groups asked to study and solve particular problems.

2. **Teams that make or do things** need to have a relentless focus on performance.

3. **Teams that run things** tend to be rare, especially in large, complex organizations. Despite the fact that many leaders refer to the group reporting to them as a team, few groups of executives really are. Teams at the top are the most difficult to create, but at the same time they are the most powerful when they work well. In addition, teams that run things often find it difficult to formulate a purpose that is distinctive and specific to the team, as opposed to the total organizational mission.

CHARACTERISTICS OF AN EFFECTIVE TEAM

A climate of TRUST is the foundation for all of the following characteristics:

- Each member is willing to work toward a shared vision/goal.

- The team continually examines its own processes.

- Influence and leadership rotate, depending upon the task at hand.

- Each member listens to and respects the others.

- Differences of opinion are encouraged and freely expressed.

- Conflict is viewed as healthy, is surfaced and is managed.

- Team focus is on solving problems, rather than on interpersonal competition.

- Relationship and task roles are balanced.

- Risk taking is encouraged. Mistakes are learning opportunities.

- The team is responsive to internal and external change.

- Team performance is periodically evaluated by members.

- Members grow personally and professionally from their association with the team.

Adapted from Hanson and Lubin

THE DEVELOPMENT OF AN EFFECTIVE TEAM

Based on the work of Bruce W. Tuckman

- EACH STAGE BUILDS ON THE PREVIOUS ONE
- EACH PREPARES FOR THE PERFORMANCE STAGE
- SKIPPING ANY STEP AFFECTS PERFORMANCE NEGATIVELY
- WITH EVERY NEW CHALLENGE, THE PROCESS MUST BE REPEATED

PERFORMING

TASK: ●Achieving effective and satisfying solution to problem, with appropriate controls

- ●Working collaboratively
- ●Caring about others
- ●Establishing unique identity as group
- ●Interdependent

NORMING

TASK: ●Agreeing about roles and processes for problem-solving

- ●Negotiating
- ●Using consensus

STORMING

TASK: ●Identifying power/control issues
- ●Gaining skills - communication, identifying resources

- ●Expressing differences - ideas, feelings, opinions
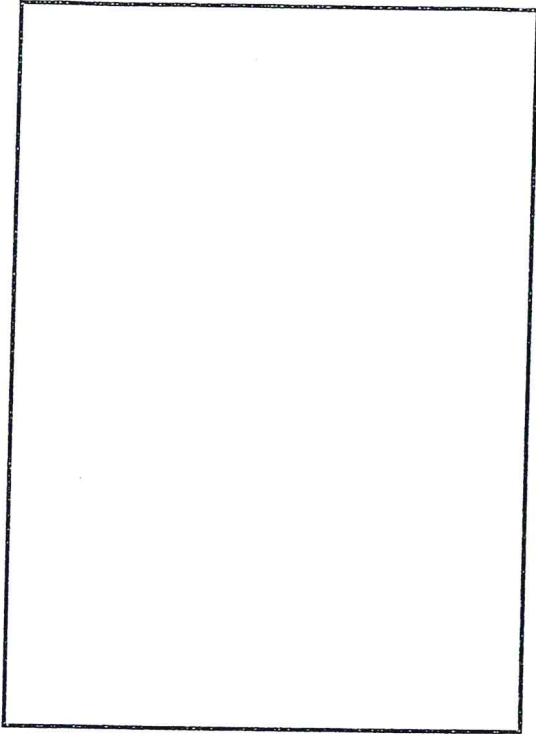- ●Reacting to leadership
- ●Independent/counter-dependent

FORMING

TASK: ●Establishing base level of expectations and similarities
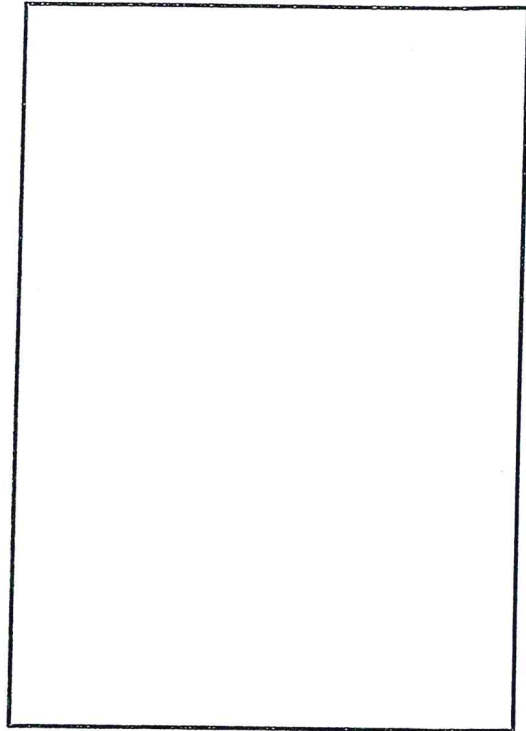- ●Agreeing on common goals

- ●Making contact/bonding
- ●Developing trust
- ●Dependent
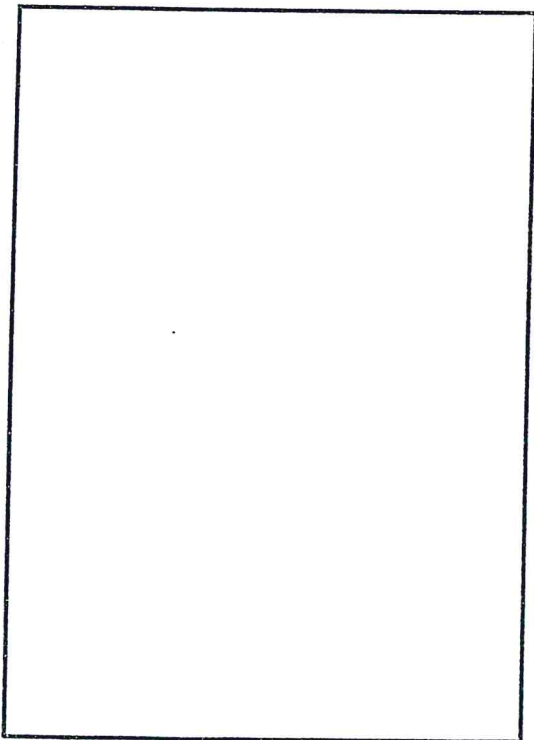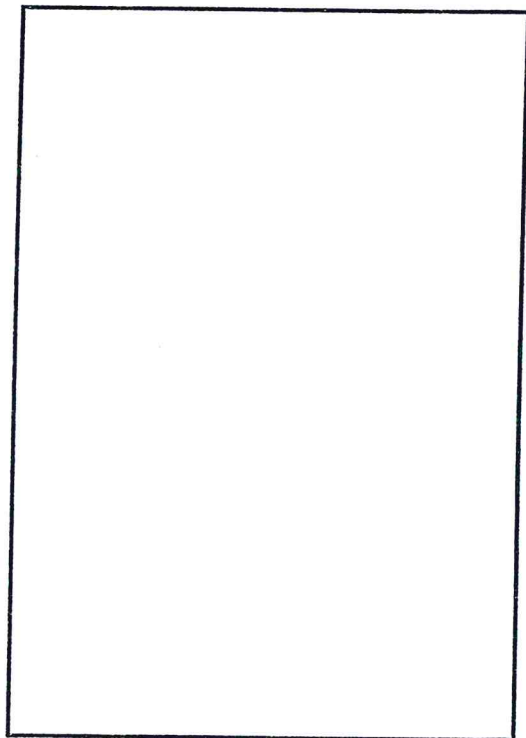
10

KNOWING BOUNDARIES!

My job is...

My job is not...

Your job is...

Your job is not...

Adult Learners Are Motivated In Different Ways

Key researchers:
Abraham Maslow
Frederick Hertzberg
William Glasser
Terrence Deal
Fred H. Wood
Steven R. Thompson

For years, educators have discussed the use of positive and negative reinforcement and intrinsic and extrinsic motivation. Based on the experts and the research, several things stand out:

- No one way of motivating people is best.
- What excites one may completely turn another off; people get motivated for their own reasons not yours.
- Proper motivation can be used to get more people more involved at a higher level of learning.

Trainers traditionally use the types of motivation with which they are most familiar. To expand our understanding of motivation beyond ourselves and become more adept at instilling motivation, we need to consider a variety of motivation types. Listed below are different types of motivation and examples of each. Bear in mind that individuals can vacillate between these modes.

Satisfaction
From a single-task perspective, satisfaction generally comes from achieving goals, primarily from reaching short-term or single-task goals like writing a report, highlighting text in a chapter or doing homework.

Affiliation
Affiliation involves developing an enhanced connection between people. This is achieved by establishing a warm and caring environment; providing opportunities for regular interactions; receiving reinforcement for accomplishments; and feeling a sense of belonging to the group. In addition, some people enjoy working in cooperative groups, discussing and sharing ideas, or performing together (role-playing and skits).

Incentives
Incentives involve the idea of "earning" something for what is done. Recognizing a group for completing the project first or even giving trinkets for early attendance may motivate some adults. Some also appreciate treats.

Excitement

Excitement is the emotional response from an internal or external stimulus that increases our focus, energy, interest or pleasure. For holistic learners, excitement is a tremendous motivator. It releases adrenaline and drives them to greater heights, focus and involvement. Excitement can be used as a motivator in a variety of ways. For example, most holistic learners are motivated by doing things that are challenging, involve risk, are competitive, or require them to face the unknown. Also, because of their natures, holistic learners tend to be motivated by high expectations, pressure, deadlines and stress. In fact, many holistic learners will sit dormant (in the "off" position) until their emotional "alarm" is triggered.

Single-task learners, on the other hand, prefer things to be predictable, steady and consistent. As a result, most forms of excitement are not particularly motivating to them, except in small, controlled doses. Also, while single-task learners do get excited, they tend to do so incrementally; their excitement builds as each step is completed.

Duty

Using duty as a motivator involves establishing a sense within people that working hard, producing high-quality work, and doing their best is an obligation that they have to themselves and/or those around them. Duty to oneself includes cultivating self-discipline, self-improvement and personal responsibility; duty to others may involve honoring commitments, upholding traditions and observing customs.

Flow (momentum)

The philosophy of flow is that once learners get involved, they tend to stay involved. Because single-task learners are constantly flowing in a steady and consistent manner, flow applies mainly to holistic learners who, because of their "on or off" behavior, typically have trouble getting started. That is, holistic learners may need assistance establishing flow. Once they get started, they become focused and tend to maintain their focus until tasks are finished. Examples of ways to establish flow include developing positive habits, having systems, focusing attention on the task at hand, working through tough moments and struggles, and recognizing when the end is in sight.

Existing research suggests that adults will be motivated if we:

- Create a need;
- Make them feel personally responsible;
- Sustain interest by involving participants;
- Relate the information to life;
- Get excited about the information;
- Establish long-range objectives;
- Facilitate social interactions;
- Allow participants choices during the session;
- Recognize accomplishments during the session; and/or Promote healthy competition.

Based on an extensive review, Wlodkowski (1985) lists specific factors that have an impact on motivation:

ATTITUDE: the learner's combination of concepts, information and emotions about the learning that results in a predisposition to respond favorably.

NEED: the current condition of the learner, experienced as an internal force moving the learner toward the goal.

STIMULATION: any change in perception or experience of the external environment that prompts the learner's action.

AFFECT: the learner's emotional experience (feelings, concerns, passions).

COMPETENCE: the learner's sense of effectively interacting with the environment.

REINFORCEMENT: the learning event maintains or increases the probability that the learner will achieve the appropriate response.

MANAGING DIFFICULT PEOPLE

Difficult people are everywhere. They can be negative, irritating, and seemingly impossible to deal with. They create stress for everyone around them.

Sometimes it seems easier to avoid or "work around" difficult people, but this is never a good long-term solution. If you learn to assess the person's behavior and listen with genuine interest, it is possible to effectively deal with difficult people. Good leaders never avoid difficult situations.

Listed below are seven difficult personality types to help you learn how to manage difficult people. In all seven cases, the behavior of each type is described first; followed by effective action you can take to handle each type of behavior.

SEVEN DIFFICULT PERSONALITY TYPES

1. ATTACKERS

Behavior: Attackers assert their viewpoint forcefully. They require people to listen to what they say. They need room and time to blow off steam.

Your Action: To help disarm attackers, address them by name and quietly, but firmly, ask him or her to sit. Then listen carefully to what the attacker has to say. Once calmed, the attacker usually becomes reasonable and may suggest valuable solutions. The worst coping behavior on your part would be to return the attack.

2. EGOTISTS

Behavior: Egotists also assert themselves, but unlike attackers they are usually subject experts.

Your Action: Show honest respect for their knowledge, but don't become intimidated by it. Instead, capitalize on what they know by asking questions and compliment them when they provide helpful information. It is important for them to realize that even though they may be an expert in a particular subject, you are still the leader.

3. SNEAKS

Behavior: Sneaks take "potshots" and often use sarcasm as a weapon.

Your Action: Confront sneaks with direct questions and let them know you do not appreciate their sarcasm. Use positive reinforcement when possible to steer them toward becoming more of a team player.

4. VICTIMS

Behavior: Victims see everything negatively. They act powerless and defeated, often whining about everyone and everything.

Your Action: Ask them for suggestions to improve the situation. Have them state the negatives and address each logically and positively.

5. NEGATORS

Behavior: Negators are usually suspicious of those in authority and believe that their way of doing things is the only way.

Your Action: Let negators use their negative "ammunition" in group meeting, then let co-workers express their views about possible solutions. they will usually try to "enlighten" negators that better solutions exist.

6. SUPER-AGREEABLE PEOPLE

Behavior: Super-agreeable people have such a strong need to be liked that they do whatever you request at the expense of their own needs. they will over-commit and often disappoint and frustrate everyone.

Your Action: Monitor assignments to make sure they are not overworked.

7. UNRESPONSIVE PEOPLE

Behavior: Unresponsive people are the most difficult people to manage. They are seemingly impossible to draw out.

Your Action: Use open-ended questions that require more than a "Yes" or "No" answer. Wait for a response. Resist the urge to finish sentences for them. Follow-up on actions assigned to them and give them assignments to present at future meetings.

MANAGING CONFLICT

Each of us operates from a unique perspective. Even if everyone has agreed on a goal or decision, disagreements can arise. An effective leader knows how to manage conflict. Strong leaders need to be proficient at conflict resolution.

HERE ARE SEVEN STEPS TO HELP YOU MANAGE CONFLICTS MORE EFFECTIVELY:

- Schedule a meeting with the other party to discuss the situation.

- When you meet, initiate a discussion that acknowledges there is a conflict.

- Use "I" statements to avoid accusations. Encourage the other party to us "I" statements, too.

- Ask direct questions that require the other party to talk about the situation.

- Repeat what you are hearing. "Based on what you've told me, this is how you see the situation." This is a good way to confirm that you understand what you are hearing.

- Tell the other party what you want as an outcome and ask what they want.

- Agree to work towards a resolution and then follow-up on the situation to make sure that each person is doing what was agreed upon.

CONFLICT RESOLUTION STYLES

There are five basic approaches to conflict resolution. They are summarized below. Indicate the one you are most likely to use with your peers/members with a "P", with your supervisor, an "S", and with family members, an "F".

STYLE	CHARACTERISTIC BEHAVIOR	USER JUSTIFICATION	P,S, or F?
Avoidance	Non-confrontational. Ignores or passes over issues. Denies issues are a problem.	Differences too minor or too great to resolve. Attempts might damage relationships or create even greater problems.	
Accommodating	Agreeable, non-assertive behavior. Cooperative even at the expense of personal goals.	Not worth risking damage to relationships or general disharmony.	
Win/Lose	Confrontational, assertive and aggressive. Must win at any cost.	Survival of the fittest. Must prove superiority. Most ethically or professionally correct.	
Compromising	Important that all parties achieve basic goals and maintain good relationships. Assertive but cooperative.	No one person or idea is perfect. There is more than one good way to do anything. You must give to get.	
Problem Solving	Needs of both parties are legitimate and important. High respect for mutual support. Assertive and cooperative.	When parties will openly discuss issues, a mutually beneficial solution can be found without anyone making a major concession.	

Communication

Communications Checklist

- ☐ Publish a newsletter or newspaper on a regular basis.

- ☐ Periodically issue flyers.

- ☐ Publish position papers when needed.

- ☐ Conduct surveys of your membership's attitudes regarding pertinent issues, contract negotiations, etc. and publish the results.

- ☐ Purchase, lease or have access to appropriate office equipment for production and duplication of materials.

- ☐ Maintain a supply of materials needed to produce newsletters and flyers.

- ☐ Maintain a supply of back and white photos.

- ☐ Develop a system for distribution of literature.

- ☐ Maintain up-to-date bulletin boards that are prominently placed in all buildings.

- ☐ Purchase a telephone answer machine to receive messages and to serve as an information hotline.

- ☐ Establish a telephone hotline with up-to-date messages.

- ☐ Have access to a telephone bank.

- ☐ Devise an emergency fan out or telephone tree.

- ☐ Issue regular news releases to newspapers, television networks and radio stations.

- ☐ Visit worksites regularly.

- ☐ Maintain an up-to-date mailing list of other individuals and groups you may need to contact.

- ☐ Maintain an up-to-date file of all media outlets within your local's jurisdiction.

- ☐ Conduct one or two community outreach projects per year and give wide publicity to them.

- ☐ Establish a community outreach committee to implement ongoing projects that enhance the union's image.

- ☐ Issue properly prepared news releases.

- ☐ Conduct news conferences to deal with significant issues.

- ☐ Seek to participate in local radio and television talk shows, interviews, editorial responses, etc.

- ☐ Utilize cable, public and commercial television opportunities.

- ☐ Utilize radio public service announcements.

- ☐ Prepare and present videotape, slide and other audiovisual presentations.

- ☐ Attend school board meetings and make periodic presentations.

- ☐ Organize a speakers' bureau.

- ☐ Maintain regular contact with press and other media representatives.

- ☐ Maintain regular contact with government officials.

- ☐ Maintain regular contact with parent and community groups.

- ☐ Maintain regular contact with business leaders.

- ☐ Maintain regular contact with affiliated unions.

- ☐ Put the AFT and NYSUT on your mailing list.

- ☐ Call on NYSUT for help with communications and public relations.

5 tips for running an effective Web site

NYSUT Communications - June 1, 2007

These tips have been adapted from training given by NYSUT's Communications Department.

1) Remember that a Web site can say a lot about your organization: When you make the commitment to have a Web site, you should also make the commitment to keep it updated. When members, journalists or the public access your site and see that the most recent item is a couple years old, it casts your union in a poor light. If you are concerned about your ability to keep your site updated, launch just a simple site with basic information about your union and how to contact you. This will be simpler to keep current than a news section, for example.

2) Delegate authority: Don't be afraid to ask for volunteers who can be responsible for keeping your Web site up to date. Statistics show that the vast majority of American adults are Internet users, and the chances are good that you have members with the technical skills to keep you site current and looking good.

3) Understand that your content may not be private: If access to your Web site will not be password-protected, understand that anything you post will be visible to the general public. Keep that in mind as you decide what types of content you should post. Avoid posting anything you wouldn't want your whole community to know.

4) Decide what you really need: Everyone wants to create a Web site with every imaginable bell and whistle, but if you take this approach you may be asking for headaches. Have a frank discussion about what the real goals of your Web site are. If you are just looking for a place to keep members updated on current issues, you may not need an e-commerce platform, a flashy into, or other extra features. Start with something simple and manageable, and grow as needed. There are several free and low-cost hosting sites on the Web (such as Yahoo!, Bizland, GoDaddy and more), and sites that offer inexpensive templates. TheTemplateStore.com, for example, has many templates for less than $50.

5) Don't expect the Web to replace other forms of communication: Just because you build it, don't expect everyone to come. The Web augments your communications efforts, but it can not replace putting a hard-copy newsletter in someone's hands or having a face-to-face conversation. Always bear in mind that, with the Web, you are depending on the user to come seek information. Your rate of contact with your members will always be something less than 100 percent.

CREATING AND MAINTAINING A PROFESSIONAL FACEBOOK PAGE

Guidelines:

> ➢ Create separate personal and professional Facebook pages.

> ➢ Don't share personal information.

> ➢ Don't discuss non-educated related issues or politics.

> ➢ Know and use your privacy settings.

> ➢ Keep appropriate Facebook hours.

> ➢ Use Facebook as a teaching tool, not to avoid teaching.

> ➢ Avoid using emojis.

> ➢ Have permission before posting classroom pictures.

> ➢ Report and delete inappropriate wall posts or tagged photos

MAXIMIZING TWITTER'S EFFECTIVENESS

1. **Follow Back.** Twitter is social. Communities run on reciprocity so follow back the real people who follow you. Having nearly the same amount of followers as you are following is not harmful to your brand.

2. **Develop Relationships.** We often ask what is in it for us, but seldom focus on the motivations of the person we want to Retweet (RT) our messages so that we can grow our network, increase brand identification, and inspire action for our cause. By Retweeting their content when it is appropriate, you validate them as important and increase their influence. Just like any real world activist, motivation is triggered by empowerment and shut down with arrogance. And like anything else, you need to earn respect in the twitter community; it's not a given

3. **Interaction.** Asking questions and commenting back when someone has an answer is creating a "conversation." Interaction helps build relationships and digital intimacy.

4. **Acknowledge.** Thank people when they RT you. Once or twice a day put together a list of the names of people you interacted with and give them a communal shout out.

5. **Trending Topics.** Occasionally check them out. If one will fit with your topic, it might open your message up to a wider and different audience.

6. **Be Authentic.** If you are going to put out a couple of tweets a day of your own content with nothing more, Twitter is probably not working for you. People want to know that behind the curtain a real person exists who authentically cares about your cause. Don't assign Twitter to someone in your organization that doesn't have an interest in using it effectively.

7. **Partnerships are important.** Just like you develop relationships with influencers, do the same with other organizations. Find out what other organizations are working around your cause.

8. **Strategize.** Social media isn't worth the time and money without a game plan. Twitter takes a lot of time investment, decide what your goals are, and set up a plan to get there.

9. **Length of Tweets.** Try and keep you content to less than 140 characters.

10. **Experiment.** Don't just depend on the big ROI patterns, but pay attention to what is getting the most action. Hootsuite allows you to view daily tweets and the amount of clicks each get.

http://www.bethkanter.org/twitter-rules/

Internal Communication

Internal Communication

Newsletters
- All members
- Local Leaders

Surveys
- Bargaining
- Single Issue
- Problem Solving

Polls
- Telephone
- Written

Focus Groups
- 2-way Communication

One to One
Worksite Structure
- How Union Representatives organize worksite
- How communications are organized at worksite
- Who does what

5 tips for running an effective newsletter

NYSUT Communications - June 1, 2007

These tips have been adapted from training given by NYSUT's Communications Department.

1) Tap into your union's hidden talent: You already have many tasks as a union president – don't try to run the union newsletter by yourself. Within your membership, you probably have a great deal of talent. Perhaps you have an art teacher who is skilled at graphic design, or School-Related Professionals who have a great deal of technical or computer experience. Draw on these resources to form a newsletter team.

2) Set a budget and schedule you can live with: Your newsletter is important and it is critical you set aside funds for it in your union budget. Get cost estimates and set a publication frequency you can live with. Many unions start newsletters with the best of intentions and find they can't publish as frequently as they promised members. Be realistic when establishing a level of frequency. It's better to increase frequency than decrease.

3) Research paper and buy union: The weight and finish of a particular type of paper can have a significant effect on the cost of printing your newsletter. If you use a local printer, ask for several different paper samples and pick a few paper types that you think will work. Get project estimates for the different types of paper. You might find that choosing one type of paper over another can lead to significant savings. Also, make sure you use a union printer. To find a union printer in your area, visit the Graphics Communications Conference at www.gciu.org click on "Shop GCC."

4) Finding content does not have to be difficult: Filling your newsletter with content may be easier than you think. For example, all articles in *New York Teacher* are copyright-free for NYSUT locals. You can copy and paste them from NYSUT's Web site at www.nysut.org. Also, NYSUT's Leader Access Web site has a photo gallery with professional photos you can download for newsletter use. Other content ideas include: a calendar of upcoming events; a letter from the union president; tips on how to access union resources; and profiles of members (this can be as simple as having a member fill out a form with a few questions).

5) Financial support is available: The NYSUT Member Benefits Trust and the American Federation of Teachers, one of NYSUT's national affiliates, will pay you to run ads on the services they offer. These fees can be used to help underwrite the cost of your newsletter.

Planning

Three Statements That Can Change the World

Vision Statement

A statement of what is possible - what does our ideal future look like?

- The Faculty Union shall not rest until all of our members are treated with respect and compensated fairly for their work.
- "No child in our city will go hungry to bed in the evening." (Soup kitchen)

Mission Statement

How do we achieve our vision?

- NYSUT Mission Statement:

   Through a representative democratic structure, New York State United Teachers improves the professional, economic and personal lives of our members and their families, strengthens the institutions in which they work, and furthers the cause of social justice through the trade union movement.

- New Jersey Laborers' Union Mission Statement:

   Everyday people depend on the work of the New Jersey Laborers Union. Whether it's repairing the roads we drive on, building the schools where children learn, or any one of the thousands of other projects we work on— our men and women are not only proud to build, but to build a better New Jersey.

Values Statement

List the priorities guiding the local's method of operation.

- Commitment (to our members' work life)
- Accountability (to our members)
- Respect for the worth and dignity of individuals
- Inclusiveness and social justice;
- Transparency, integrity and honesty;

PLANNING THE YEAR'S PROGRAM

An active local builds pride in its union. It causes members to unite in their efforts to achieve objectives for themselves and education. An active local generates faith in the teaching and support staff and develops public confidence in the schools

An important factor in building a strong local union is the year's *program of action*. The good program takes the union dynamic, inspiring and successful.

The president and the members of the executive committee are key in the planning and promotion of the local program, but they don't work alone. The responsibilities must be shared with the members. However, in the final analysis, the local's program greatly depends on the officers leadership, knowledge, attitude, and the understanding they bring to the job. Situations will provide opportunities for members to work and plan together. Local leaders determine the goals they will strive to achieve, the progress made toward these goals, and who will be involved in attaining these goals.

There are several factors which should be taken into account when mapping out the year's program of activities:

- the educational situation of the community
- the pressing problems of the local
- the needs and desires of the members
- time and resources available to members and officers
- the interests and capabilities of the members
- the projects and activities of the state and national organizations
- the need for a well-rounded program

ACTION PLANNING STEPS

DEFINE THE PROBLEM
1. Who is involved?
2. What behaviors describe how people act toward the problem?
3. What information do we need?
4. Is the problem manageable?
5. Is there agreement?

DESCRIBE DESIRED OUTCOME
1. How will we know when we have solved the problem?
2. What outcomes do we want?
   a. Conditions
   b. Behaviors
   c. Attitudes
3. Is there agreement?

PROPOSE ALTERNATIVES
1. How many different ways could we reach our desired outcomes?
2. Have we exhausted all possible ways of succeeding?

ANALYZE ALTERNATIVES
1. What resources do we need for each alternative? that is people, time, money, and materials
2. What are the benefits of each?
3. What are the restraining forces of each and can they be reduced?

SELECT BEST ALTERNATIVE
1. What decision-making techniques shall we use?
2. Do desired outcomes need reevaluation?
3. Is there general agreement on priorities?

PLAN ACTION STEPS
1. What procedures will we use?
2. Who is responsible for what?
3. When will the action take place?
4. Do we need a back-up plan?

TAKE ACTION
1. Do it!!

EVALUATE PLAN
1. Have you reached the desired outcomes?
2. What steps helped or hindered your progress?
3. Provide feedback to all concerned?
4. Redefine problem if necessary?

EVALUATE PROCESS
1. Have you shared your feelings and opinions about the way we are working (or will work) together?
2. How can we improve our working relationship?

The last step, EVALUATE PROCESS, should be implemented concurrently throughout the process.

Building Your Local's Strategic Plan

Vision, Mission, Values Statements

Local Name:_____

Vision Statement

A statement of what is possible - what does our ideal future look like?
Examples:

- Our Union shall not rest until all of our members are treated with respect and compensated fairly for their work.
- "No child in our city will go hungry to bed in the evening." (Soup kitchen)

Sample vision statements related to member engagement:

- The [insert local name] and its Executive Board will create a culture of member engagement, empowerment and activism.
- The [insert local name] and it Executive Board will create a culture to build local capacity, engage members and improve communication.

Develop a vision statement for your local:

_____

_____

_____

_____

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_____

Mission Statement

Defines how an organization intends to achieve its vision statement.
Example:

- ∘ New Jersey Laborers' Union Mission Statement:
  Everyday people depend on the work of the New Jersey Laborers Union. Whether it's repairing the roads we drive on, building the schools where children learn, or any one of the thousands of other projects we work on—our men and women are not only proud to build, but to build a better New Jersey.

Sample mission statement related to member engagement:

- ∘ NYSUT Mission Statement:
  Through a representative democratic structure, New York State United Teachers improves the professional, economic and personal lives of our members and their families, strengthens the institutions in which they work, and furthers the cause of social justice through the trade union movement.

Develop a mission statement for your local:

_____

_____

_____

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_____

_____

Values Statement

This statement lists the priorities guiding the local's method of operation.
Examples:
- Commitment (to our members' work life)
- Accountability (to our members)
- Respect for the worth and dignity of individuals
- Inclusiveness and social justice;
- Transparency, integrity and honesty;
- The [insert local name] will achieve its mission by adhering to these values: Inclusiveness, transparency, integrity and honesty.

Sample values statement related to member engagement:
- The [insert local name] is committed to the well-being of our members, affiliate locals and coalition partners.
- The [insert local name] is committed to the strengthening of the membership and local affiliates.

Develop a values statement for your local:

_____

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Goals

Goals are specific statements of what the organization intends to achieve.
A goal must indicate in concrete and specific terms:

- who is responsible
- what the outcome is to be
- how the outcome is to be measured, and
- the target completion date for the goal.

Sample Goal:

The executive board of the local will recruit 45 new members by December 31.

Sample: Goals related to member engagement:

- Through vigorous advocacy and member engagement the local and its staff will protect our affiliates' and members' rights while advancing NYSUT's mission.
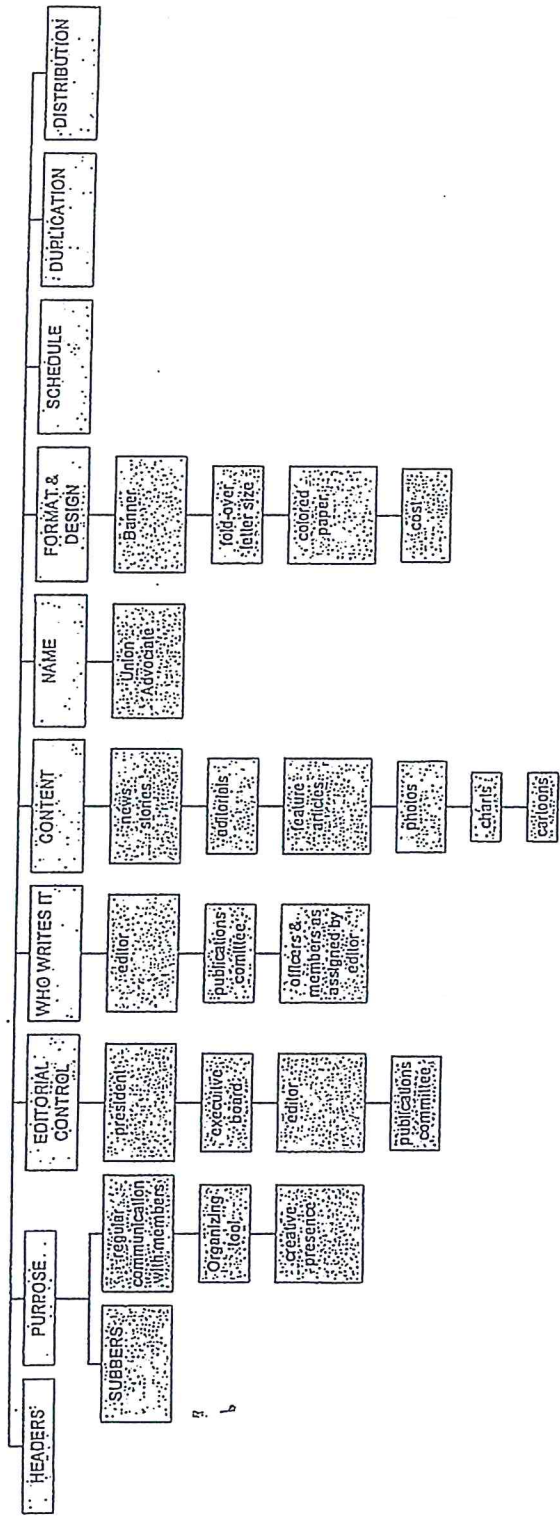
Develop a goal for your local:

_____

_____

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GOAL

TO PUBLISH MONTHLY LOCAL NEWSLETTER THIS YEAR

HEADERS / SUBBERS	PURPOSE	WHO ESTABLISHED EDITORIAL POLICY	DISTRIBUTION	FEATURE ARTICLES	NEWS STORIES	DUPLICATION	WHO WRITES IT	SCHEDULE	FORMAT & DESIGN	NAME	MISC.
	response to member complaints	president	members only	President's Column	contract developments	volunteer or hire	members & officers assigned by editor	3rd Thursday	fold-over letter size	Monthly Memo	Cost?
	provide a forum	membership	employee rest areas	Steward of the Month	conventions	employer's facilities	local secretary	week after union-employer consultation	banner	Union Advocate	
	organizing tool	stewards council	home mail	Member of the Month	Employer actions	print shop	president	full moon	multiple graphics (photos, chart & cartoons)	Idiot's Delight	
	create presence	executive board	hand distribution	Grievance Report	executive board actions	photocopy	clerical employee	special issues	8-page tabloid	Local News	
	regular communications with members	English teachers	worksite mail boxes	Why I'm Union	national and state AFT		publications committee	only during school year	one side legal page	Challenger	
		publications committee	monthly membership meeting	AFL-CIO Update	human interest items (gossip)		school newspaper	advisor	halftones	Employee Voice	
				Labor In Our Community	community issues		volunteers	1st Wednesday	colored paper	Unity	
				From the Legislature			editor	combine Dec. & Jan.	color on front page	United Action	
							some English teacher		copy USA Today		

Sample Project Board
At End of Creative Thinking Phase

GOAL
TO PUBLISH MONTHLY LOCAL NEWSLETTER THIS YEAR

HEADERS	PURPOSE	EDITORIAL CONTROL	WHO WRITES IT	CONTENT	NAME	FORMAT & DESIGN	SCHEDULE	DUPLICATION	DISTRIBUTION
	SUBBERS	president	editor	news stories	Union Advocate	Banner			
	regular communication with members	executive board	publications committee	editorials		fold-over letter size			
	Organizing tool	editor	officers & members as assigned by editor	feature articles		colored paper			
	creative presence	publications committee		photos		cost			
				charts					
				cartoons					

Partially Completed
Sample Project Board
During Evaluation & Critical Thinking Phase

GANTT CHART

PROJECT: <u>PHONE BANK</u>

TIMELINE

MONTH:

ACTIVITY	ASSIGNMENT	Week: 1	2	3	4	5	6	7	8	9				
Secure Phone Date	President	↑												
Recruit Callers	PAC-Chair					↑————————				↑				
Hold Bldg. Meetings	B. Rep					↑———	↑							
Circulate Sign-ups	B. Rep						↑———	↑						
Collect Sign-ups	PAC-Chair							↑———	↑					
Confirm Sign-ups	PAC-Chair								↑					
Determine Audience	Exec. Comm.			↑———	↑									
Adopt Message	PAC-Chair					↑———	↑							
Obtain Phone Numbers	PAC-Chair					↑————————			↑					
Call NYSUT	President		↑											
Check Directories	Committee			↑————————————					↑					
Orient Callers	PAC-Chair									↑				
Make Calls	Volunteers									↑				

GANTT CHART

PROJECT: _____

TIMELINE

MONTH: _____

Week: 1 2 3 4 5 6 7 8 9

ASSIGNMENT

ACTIVITY

YOUR UNION NAME HERE

Gantt Chart for Strategic Planning

Committee: _____

Project: _____

Project Coordinator: _____

Timeline

Activity	Committee Member	September	October	November	December	January	February	March	April	May	June	Summer

S.W.O.T Analysis Discussion Questions

Internal	*Strengths* • What are our resources – members, rep structure, officers, NYSUT and national affiliates? • What other resources do we have as a union – financial, structural? • What relationships do we have as a union? • What have been our past successes and what were the factors that made those achievements possible? • What advantages do we have? • What experience accrues to our benefit? • Other?	*Opportunities* ◦ Do we lack resources? What are they? ◦ Are we prepared? If not, how? ◦ Are there relationships we should have that we do not? What are they? ◦ When have we not succeeded and why? What weaknesses does this suggest? ◦ What disadvantages do we face? ◦ Are there gaps between what we think we can do and what we have done? ◦ Other?
External	*Weaknesses* • What situations or circumstances exist that work in our favor? • What vulnerabilities does the employer have? • What relationships do we have with stakeholders and allies? • What political, economic, social or technological factors present opportunities for our union and our members? • Other?	*Threats* ◦ What strengths does the employer have? ◦ What obstacles do we face? ◦ What political, economic, social or technological factors pose a problem for our union and our members? ◦ Other?

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S.W.O.T Analysis

	Internal	External
	Strengths	*Opportunities*
	Weaknesses	*Threats*

SWOT Analysis

Greatest Strength:_____

Greatest Weakness:_____

Greatest Opportunity:_____

Greatest Threat:_____

Strengths

Internal | External

Opportunities

Internal | External

Weaknesses

Internal | External

Threats

Internal | External