Section 5: Engaging Members in Political Action and Community Collaboration

Connect legislation, school board activities and the impacts on the members day-to-day and the classroom.

Identify what matters most to members and engage in political activities that further the interests of the Local.

Allow members' voices to be heard by educating about and encouraging participation in the endorsement process of the pro-public education candidates.

Lead members in engaging their local, state, and federal elected officials on issues important to public education.

Create momentum and engagement around our issues and the power of members to enact change when conducting fundraising drives for the OEA Fund.

Shape the outcomes of levy campaigns and local school board elections by leveraging members' collective power.

Why Political Action?

Nearly every aspect of the school day is in part shaped by decisions made by elected officials, it is imperative that we have a strong voice in deciding who is making those decisions.

By becoming active in the political arena--by working to influence decisions makers, through lobbying, recommending, campaigning, donating to pro-education candidates—you can help yourself, your colleagues and your students realize that better tomorrow.

Public employees have a personal stake in the outcome of decisions made by public officials. Your salaries, your retirement protection, even the hours you work are determined by people who are either elected or appointed officials.

Political activity guarantees us a seat at the policy-making table. Political involvement separates the players from the non-players.

What is the OEA Fund?

The Ohio Education Association has established a political action committee, so that educators can legally donate voluntary contributions to candidates and candidate campaigns. Money contributed to OEA Fund is used to support pro-public education candidates for statewide offices such as Governor, State Auditor, Secretary of State, and Supreme Court Justice, and for State Senators and State Representatives.

Twenty percent of the money donated to OEA Fund is deducted and forwarded to the National Education Association. The NEA Fund uses that money to assist pro-public education candidates for Congress and for the United States Senate as well as for the Presidency of the United States.

Contributions are purely voluntary and are not dues dollars. Members are free to refuse to contribute without it affecting their membership status in any way.

If your Local Education Association currently has or creates a local Political Action Committee (PAC), you may request that a portion of the money sent to OEA/NEA Fund be returned to your local PAC for use in supporting endorsed candidates for your local Board of Education. This is accomplished by submitting a written request for rebate to the OEA Government Relations Department on a form found in UniServ offices. A local receiving a portion of money sent to OEA/NEA Fund is prohibited from using such funds to support a candidate, issue, or position that conflicts with the position of OEA or NEA.

OEA Fund is a major factor in securing the benefits that Ohio's educators have gained over many years. OEA Fund provides OEA members with clout—both at the state and national levels. The collection of OEA Fund money should be a normal part of the duties of the local education association.

We can only have success with the OEA Fund with your help. **It is critical that you facilitate an OEA Fund drive at least once per year in your local and that you ensure that every member is <u>personally asked</u> to contribute.** The OEA Fund fundraising materials are distributed to all locals prior to the beginning of each school year.

Please contact your Labor Relations Consultant or the OEA Organizing and Member Engagement Department (614-228-4526) for support in developing and implementing the OEA Fund fundraising drive for your local.

OEA Screening and Endorsement Process for Candidates to Public Office

Our members and the learners they serve are best represented when politicians know, understand and act upon the issues that affect public education. Screening and endorsing candidates is our way to find out their views on critical education issues, develop relationships, and hold politicians accountable for their actions.

How does the OEA screening process work?

Candidate screenings are conducted by OEA members and OEA members make endorsement decisions—not staff or OEA officers. Our screenings are non-partisan and candidates of both parties are invited to participate.

There are four components utilized to evaluate candidates for endorsements:
1. Their positions on key-education issues, as explained in an interview
2. Their responses to the screening questionnaire
3. The voting record of current office holders on key-education issues
4. The candidate's viability in the race.

A candidate must participate in our screening process in order to be endorsed. The screening and endorsement process varies depending on the office being sought:

Ohio House and Senate Candidates: Candidates for the Ohio General Assembly (the Ohio House of Representatives and the State Senate) are screened by local OEA Fund screening committees. The screening committees are comprised of a District Screening Council (DSC) and members representing local associations. The DSC is comprised of five members appointed by the OEA District. Each local association within the House or Senate District being screened is invited to send one member to serve on the screening committee as well.

Statewide Candidates: Candidates for statewide office (Governor, US Senate, Secretary of State, Auditor, Treasurer, Attorney General and Ohio Supreme Court) are screened by the OEA Fund State Council. Any recommendations for endorsement made by the State Council, must be voted on by the OEA Fund Convention. This process, including the makeup of the State Council and delegates to the Convention are outlined in the OEA Fund Constitution and Bylaws.

Congressional Candidates: Candidates for Congress are screened by Congressional Contact Teams (CCT). The OEA President appoints five CCT members who reside in a given Congressional district. The team utilizes the screening questionnaire and report card developed by NEA. NEA also has a "friendly incumbent" endorsement process where incumbent officeholders with favorable voting records may be endorsed without conducting a screening.

State Board of Education: The process for screening and endorsing candidates for the State Board of Education is established by the OEA Fund State Council.

School Boards and Other Local Races: Local Associations or districts are encouraged to screen and endorse for other local offices that may affect public education in their community. One such example is local school board races.

What is your responsibility as a local president related to OEA's screening and endorsement process?

As local president, you are responsible for participating in House District and Senate District screenings in your area during legislative election years or designating another member to attend. If you cannot participate, select an alternate to serve in your place. Notify OEA Government Relations office by January 15th of each year and include your alternates contact information.

Unless a screening is planned prior to a primary election, invitations to participate in screenings are typically issued in late spring or early summer of even-numbered years. Be sure to watch for and respond to invitations to participate in screenings in your assigned House and Senate Districts in a timely manner.

Also note that a screening may not be held if a previously endorsed office holder with a positive voting record is designated as a "friendly incumbent."

Please contact your Labor Relations Consultant or the OEA Government Relations Department with any questions.

Engaging in Local Levies and Bond Issues

Few issues affect OEA members and the students we serve more than local levies and bond issues. Local property taxes provide more funding for public school districts than any other revenue source, and due to constitutional limitations on how districts can raise funds, you may find yourself in the middle of a levy campaign more frequently than you'd care to. As much as you may wish to avoid getting involved in these kinds of activities, the stakes are often too high for your local to stay on the sidelines. The difference between passing and failing a levy may affect your members' jobs, the curriculum offerings provided to your students, or the size of your classes.

The good news is you have numerous resources at your disposal if and when your local chooses to engage in a levy campaign. UniServ Political Advocacy Consultants in OEA's Organizing and Member Engagement Department are available to provide access to voter data and advice on campaign strategy when needed. Please contact your Labor Relations Consultant or the Organizing and Member Engagement Department for more information.

Some OEA Districts provide grants to give locals with acute needs related to levy campaigns financial assistance. Contact your district office for more details.

OEA also partners with Support Ohio Schools, which provides low-cost levy consulting services to local campaign committees when all key stakeholders (school board, administration, and unions) are included at the planning table.

OEA Local School Board Campaign Support

Local school board campaigns are one of the most important ways a local can engage in the political process in order to effect change. The Ohio Education Association is working with local associations to elect more friends to district school boards. With the right school board in place, associations can more effectively advocate for better working conditions for our members and better learning conditions for our students. By participating in local school board campaigns, local associations will be in a better position to affect change, negotiate good collective bargaining agreements, strengthen ties to the community, engage existing members, and recruit new members.

OEA can provide an array of resources including trainings for candidates and the development of plans to attract community allies. After initial first-step meetings with locals and LRCs to discuss the scope of political activities, plans will be developed to assist in candidate recruitment, where needed, and information will be provided about establishing a local PAC, where desired, and the rules surrounding campaign finance. OEA will also assist locals in the development of member-led campaign teams and guide these teams through public endorsement or other types of direct candidate support.

OEA can provide the following direct support:
* Assistance in building political action teams
* Assistance in determining the level of political activity that would best meet local interests
* Collecting and providing data (and analysis) to inform campaign strategies
* Identifying, recruiting, and training potential candidates
* Establishing or better utilizing a local Political Action Committee (PAC)
* Facilitating the screening and endorsement process of local candidates
* Producing materials in support of pro-public education candidates
* Providing guidance in the development and execution of communications plans
* Helping to build and strengthen a member-driven campaign

Campaign Timeline

Spring: Candidate Recruitment and endorsement

Summer: Candidate Training (offered by OEA)
            Assistance with endorsement screenings, PACs, communication plans, etc.
            Candidate Filing Deadline: early August

Fall: Member push, supporter data analysis, and GOTV

Contact

If your Local is interested in collaborating on local school board campaign support, or you feel your district would benefit greatly from electing new school board members, contact OEA Political Advocacy Consultant Zach Roberts at robertsz@ohea.org or Dominic Mendiola at mendiolad@ohea.org to discuss next steps.

Power Mapping

Power Mapping Your Way to Success

"Power mapping" is a visual exercise that helps you to identify the levers and relationships you can take advantage of to gain access to and influence over your target.

Power mapping will help you decide:
- the best possible target (i.e., who can make the change you are seeking);
- what and who might persuade them to say "yes" to your request; and
- the pathways or relationships that can get you access to, or put pressure on, the target.

Power mapping can ensure effective alliances, targeted actions, political relevance, and legitimacy. And it can help you see where your technical expertise best fits into existing public efforts and discussions.

To be as strategic as possible with your limited resources when deciding what actions to do, take a moment to better understand who can say "yes!" to what needs to change—and what makes them tick.

Step 1: Problem location

You can map around an issue or person or institution you think can solve a problem.

Step 2: Map major institutions

Identify key decision-makers, institutions or associations that are related to that problem.

Step 3: Map individuals associated with the institutions

Put the names of 2-3 individuals who are associated with each of those institutions in the second ring (moving out concentrically) around the problem. These can be people you know or don't know.

Step 4: Map all other associations with these individuals

Think about people you know connected to these key individuals. The purpose of this is to help identify easier ways to access the individuals or institutions that could help solve the problem, by tapping into existing relationships between people. At this step, you can note any relationships that members in the group have with the people listed and any information you have about them. Be creative in thinking about how you may be connected to the people brainstormed.

Also, look over the list of areas to consider while power mapping. This information should go in the third ring around the problem.

Step 5: Determine relational power lines

The next step is to step back and conceptually review the networks that the group has mapped out. You can do this by drawing lines connecting people and institutions that have relations to each other. Some people will have many connections while others may not have any.

There could be many lines. In practice, depending on the scale or newness of the "problem", it may be harder to identify institutions, people, and relationships that connect them. This step helps the group to identify what may be called the "nodes of power" within a given network.

Step 6: Target priority relationships

The next step is to analyze some of the relationships and connections and make some decisions. One way to do this is to circle the few people that have the most relational power lines drawn to them. Involving these people through your group's current relationships may be deemed a priority.

In the example above, the group might say, If no one in the group seems to be directly connected to a key target, you can go another step deeper and directly create another power map around each of these people.

Another thing to consider should be a person or institution in the map that doesn't necessarily have many different relational lines running to him/her/it but nonetheless has a few critical ones and seems to hold a lot of influence. If you can identify a priority person/institution for which there isn't a clear relationship, the takeaway may be to go and do some homework about this person/institution.

Step 7: Make a plan

The next step is to create some action steps for what to do next. These can be fairly straightforward. Determine the best approaches to accessing these individuals and institutions through relationships and who will be responsible for what by when.

Power Mapping Your Community

As a team, create one large chart like the one below:

High Support
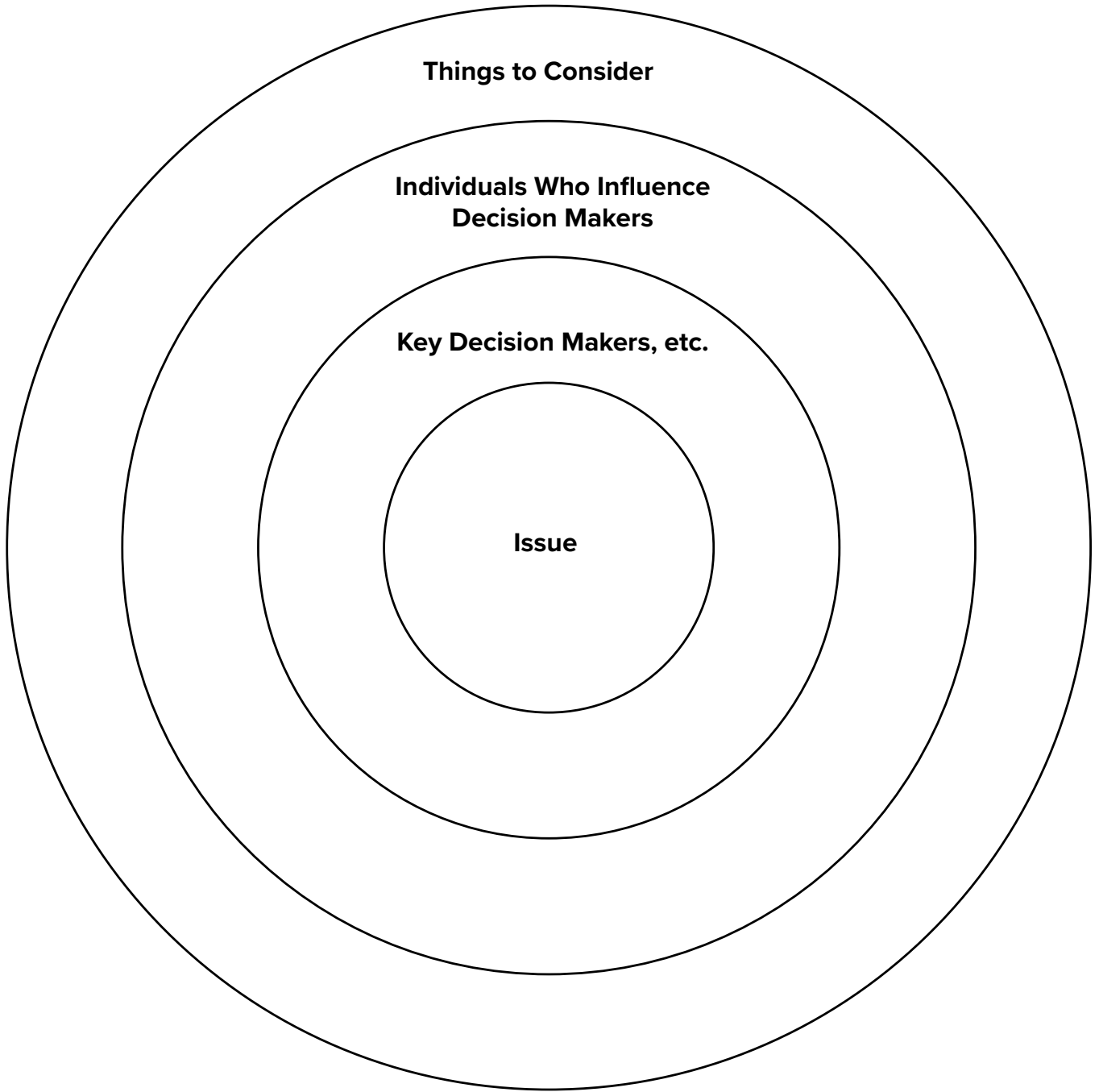
II   I

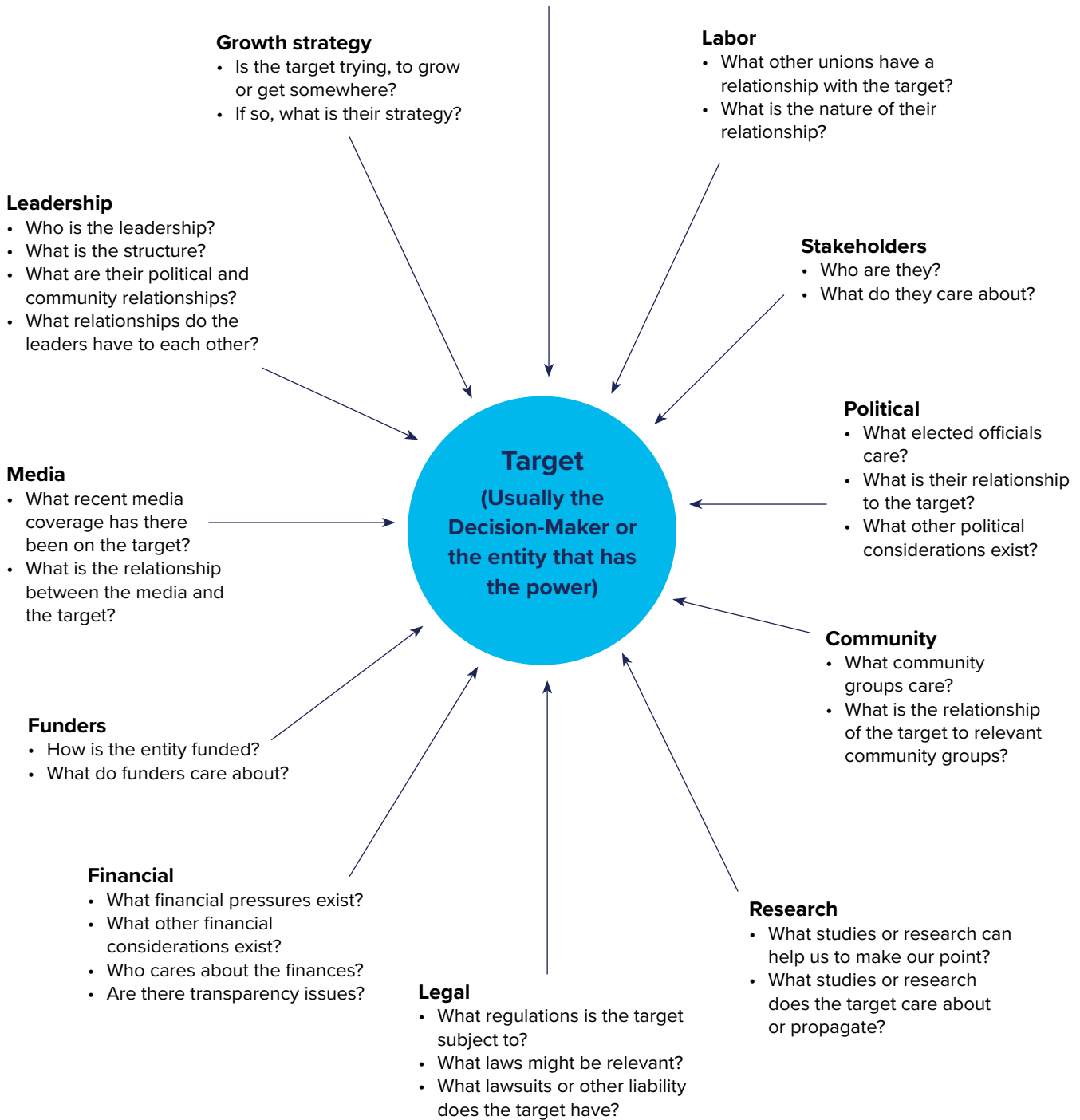**Low Influence**   **High Influence**

III   IV

Low Support
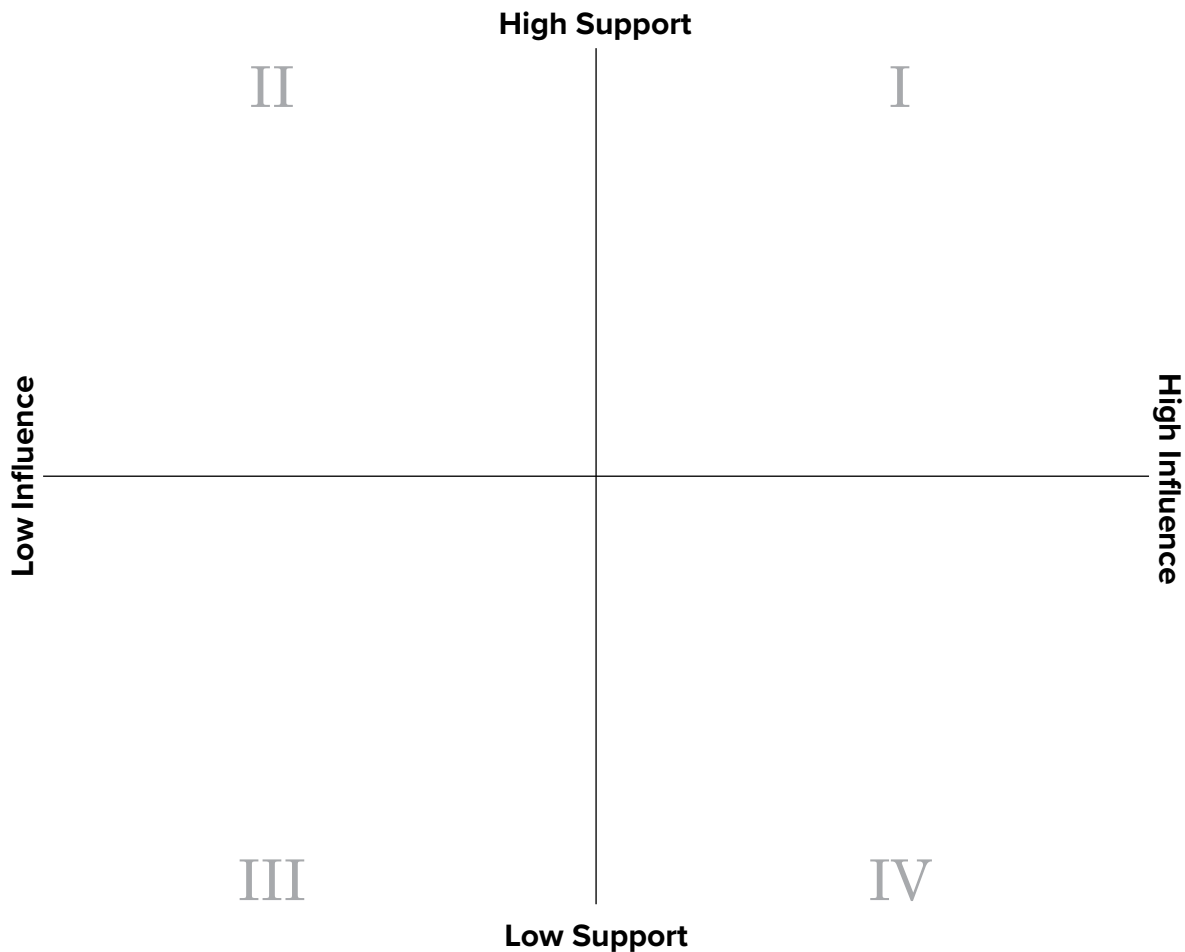
1. As a team, take a few minutes to choose an ISSUE that is important to your membership and to your association.

2. Once the issue is identified, think and discuss as a group where the post-it notes belong. How do you define "high" and "low" influence? How do you define "high" and "low" support? How can this process be data driven?

3. Once the chart paper is full of post-it notes, have a strategic dialogue about each quadrant and how to develop a plan for engaging each organization, based upon their placement. This plan may include how to move them forward to achieve your agenda, or a "battle plan" if they oppose your agenda.

4. Caution: Do not disregard quadrant IV "out of hand" as they could be powerful allies or enemies.

5. Add additional meaning and information to your map. Use colors, shapes, and various connection notations so that your map tells the story of the community and your collective relationships in it.

6. Discuss the reciprocity/mutuality of the relationships you have with your potential partner groups. What have you done for them lately? How might you show greater support for their cause/ interests?

7. Are there groups that need to be on your map that aren't? Who do you know that could help you engage or connect with those missing groups?

Things to Consider

**Individuals Who Influence
Decision Makers**

Key Decision Makers, etc.

Issue

Power Analysis for Organizing Campaigns

Who is the target accountable to?

Growth strategy
- Is the target trying, to grow or get somewhere?
- If so, what is their strategy?

Labor
- What other unions have a relationship with the target?
- What is the nature of their relationship?

Leadership
- Who is the leadership?
- What is the structure?
- What are their political and community relationships?
- What relationships do the leaders have to each other?

Stakeholders
- Who are they?
- What do they care about?

Media
- What recent media coverage has there been on the target?
- What is the relationship between the media and the target?

Target
(Usually the Decision-Maker or the entity that has the power)

Political
- What elected officials care?
- What is their relationship to the target?
- What other political considerations exist?

Funders
- How is the entity funded?
- What do funders care about?

Community
- What community groups care?
- What is the relationship of the target to relevant community groups?

Financial
- What financial pressures exist?
- What other financial considerations exist?
- Who cares about the finances?
- Are there transparency issues?

Legal
- What regulations is the target subject to?
- What laws might be relevant?
- What lawsuits or other liability does the target have?

Research
- What studies or research can help us to make our point?
- What studies or research does the target care about or propagate?

Working with Key External Stakeholders

What groups in your community are interested in ensuring a great public school for every child?

Identify (1) the external stakeholders who might be interested in collaborating with you and (2) some specifics steps they could take to support your local.

Parent organizations 1) **(Example) - OEA or your District** 2) 3)	Civic and community service organizations 1) **(Example) - The United Way** 2) 3)
Business groups 1) **(Example) - The Rotary Club** 2) 3)	Civil rights organizations 1) 2) 3)
Child advocacy groups 1) **PTOs/PTAs** 2) 3)	Churches and religious organizations 1) 2) 3)
Other education organizations 1) 2) 3)	Labor Unions 1) 2) 3)
Other 1) 2) 3)	

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ALLIANCE FOR PUBLIC SCHOOLS

nea NATIONAL EDUCATION ASSOCIATION nea.org | **CAPE** Community Advocacy & Partnership Engagement

5 Steps for Launching Your Community Outreach and Engagement Program

Strong partnerships between educators and parents and the community are among the greatest needs in public education today. Affiliates across the country are turning this obstacle into an opportunity to improve student outcomes. Thanks to outreach and engagement of educators, parents, and the community, they've dismantled toxic testing, reduced class size and invested in–rather than close–struggling schools. In the process, they're discovering a new path toward Association leadership and activism and securing important wins for students, educators and the greater common good.

Follow these five steps to build partnerships with the community:

☐ 1. LINK ENGAGEMENT GOALS TO AFFILIATE GOALS.

Consider your organizational goals. Increasing membership. Getting ESSA right in your district. Fighting privatization. Have conversations with key people within the Association–UniServ, ARs, the Board–about how those goals could benefit from the Association having ongoing mutually supportive relationships with other groups and individuals in the community.

The bottom line: community outreach and engagement is not a separate body of work, but a smart strategy that should be integrated into all we do!

☐ 2. GET MEMBERS INVOLVED.

Members aren't just educators. They're coaches and customers. Parishioners and party activists. Neighbors and volunteers. When it comes to building your outreach and engagement program that makes them a great place to start. Don't forget our ESPs tend to live where they work and retired members possess gifts of experience and time–assets to be leveraged. From surveys on where they live, play, and pray to establishing a "Community Connections" committee, an outreach and engagement program builds bridges to two key constituencies: the community and members! Use this as an engagement tool that meets an important need of members, while also allowing them to get connected and stay connected to their Association.

☐ 3. MAP YOUR COMMUNITY.

To engage the community you must understand the community. Who are the organizations touching the concerns of students, educators and public schools? What agencies and groups are respected for doing good work? Go beyond the usual suspects to influencers like entertainment, businesses and media figures that enjoy grassroots respect and loyalty. How are your leaders, members and staff connected? Lastly, make sure your community engagement looks like your community. Diversity across geographic, racial, ethnic, and socio-economic lines is essential.

☐ 4. KNOW YOUR REPUTATION.

Two prevailing narratives: the union as the obstacle or the union as the opportunist equals long-standing skepticism. Whether a result of reformers' dirty tactics or because the Association hasn't been visible since the last funding fight, an honest assessment about how others in the community see us is first step toward building trust. Just as your community is not monolithic, your reputation probably won't be either. As a reflective exercise, knowing our strengths, weaknesses, opportunities, and threats can be instructive on who to outreach–and how to engage and even navigate challenges.

☐ 5. REACH OUT. ENGAGE. CONNECT.

Look to the current priorities and upcoming events of community groups for ways to kick start engagement. Schedule coffee and LISTEN to ideas on how the Association could partner. Get on e-mail lists and use social media to like, follow and show support. Offer space and other resources of the Association. Invite the community in by adding parent, community and even student elements to Association events. But make it FUN, sitting through a long policy meeting is not the way to build a relationship.

For more information, contact CAPE Senior Policy Specialist Stacey Grissom at sgrissom@nea.org.