

We welcome your feedback! Please reach out to yro@nea.org with any comments, content you'd like to see in future versions, or new learnings we can lift up. This playbook is meant to be an evolving document, with updates coming as we learn more about running effective AutoPay campaigns.

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Introduction: Protect your power with a proactive strategy

Conversion campaigns are challenging and demanding. As the conversion efforts draw on your affiliate's resources, it will become increasingly difficult to focus on other priorities like membership growth and power-building. This is the ultimate goal of payroll deduction bans: to force affiliates into all-consuming conversion campaigns that prevent our union from building the power we need to protect public education.

Proactively converting our membership is the only way to neutralize this threat and protect our power. With every member who converts, the threat of an all-consuming campaign gets weaker and our power grows, turning their threat into an opportunity to reconnect with membership, reaffirm the value of our union, strengthen worksite structure, and build new union leaders.

As shown in the table below, state legislatures moved quickly to ban payroll deduction, giving our affiliates little to no time to convert their members. When faced with these near-impossible timelines, proactive conversion gives you the invaluable flexibility to dictate the scope and timing of your campaign, and there is strong evidence indicating that proactive conversion can significantly reduce membership losses, minimizing lasting impacts on power, density, and budget.

Recent Conversion Timelines Imposed by Legislatures

State	PRD Ban Bill Passed	Deadline to Flip (eff. date of PRD ban)	# of Days to Convert
Florida	SB256 – May 9, 2023	July 1, 2023	54
Kentucky	SB7 – Mar. 29, 2023	Mar. 29, 2023	0
Tennessee	SB281 – May 24, 2023	July 1, 2023	39
Arkansas	SB473 – Apr. 12, 2023	Aug. 1, 2023	112
West Virginia	HB2009 – Mar. 30, 2021	June 17, 2021	80
Indiana*	SB251 – Apr. 22, 2021	July 1, 2021	71

**Note: The Indiana General Assembly did not ban payroll deduction outright, but instead required that members reauthorize payroll deduction annually, which is tantamount to an outright ban. Average # of days to convert = 59*

While no strategy will make AutoPay conversion painless, being proactive instead of reactive allows for an intentional campaign that supports membership growth and capacity-building while maintaining long-term solvency. Act now to protect your power and deliver on the vision of our union: a great public school for every student.

Glossary

AutoPay	Our research shows that "AutoPay" is the most favored term among members for referring to a system of direct payment for union dues.
Electronic Funds Transfer (EFT)	A payment method which drafts money straight from an individual's bank account.
Recurring Credit Card (RCC)	A payment method which charges union dues to an individual's credit card as a series of recurring transactions.
NEA eDues	NEA's online platform that only active members can use to update their dues payment method.
AutoPay Campaign	An AutoPay Campaign is the process of moving members off payroll deduction and onto EFT or RCC. "EFT flip" and "EFT conversion" are often used to describe these campaigns.
Join Now	An online platform new members can use to join our union on payroll deduction OR AutoPay. Note that current members must use the eDues site, and not Join Now, to convert.

Key Strategy 1: Prepare your financial and member data systems

Tactic 1: Launch your AutoPay platform

Before your affiliate can begin converting members, you must set up your state's eDues page. eDues is NEA's online platform for processing EFT and RCC payments. Through the eDues page, members can switch payment methods from payroll deduction to AutoPay, as well as update bank account or credit card information. Launching your affiliate's eDues platform can take up to four to six months, so if there is a chance you will need eDues, begin the process far in advance.

Start by building a team comprised of NEA and affiliate staff to lead the adoption of eDues. Include your affiliate's executive director, business operations lead, field lead, and membership processing lead. From NEA, include your zone director from the Center for Organizing, assigned field staff, the Membership Management Services (MMS) manager, and your MMS state contact. Notify your MMS state contact when you are ready to get started!

Important! Collect key information on your locals.

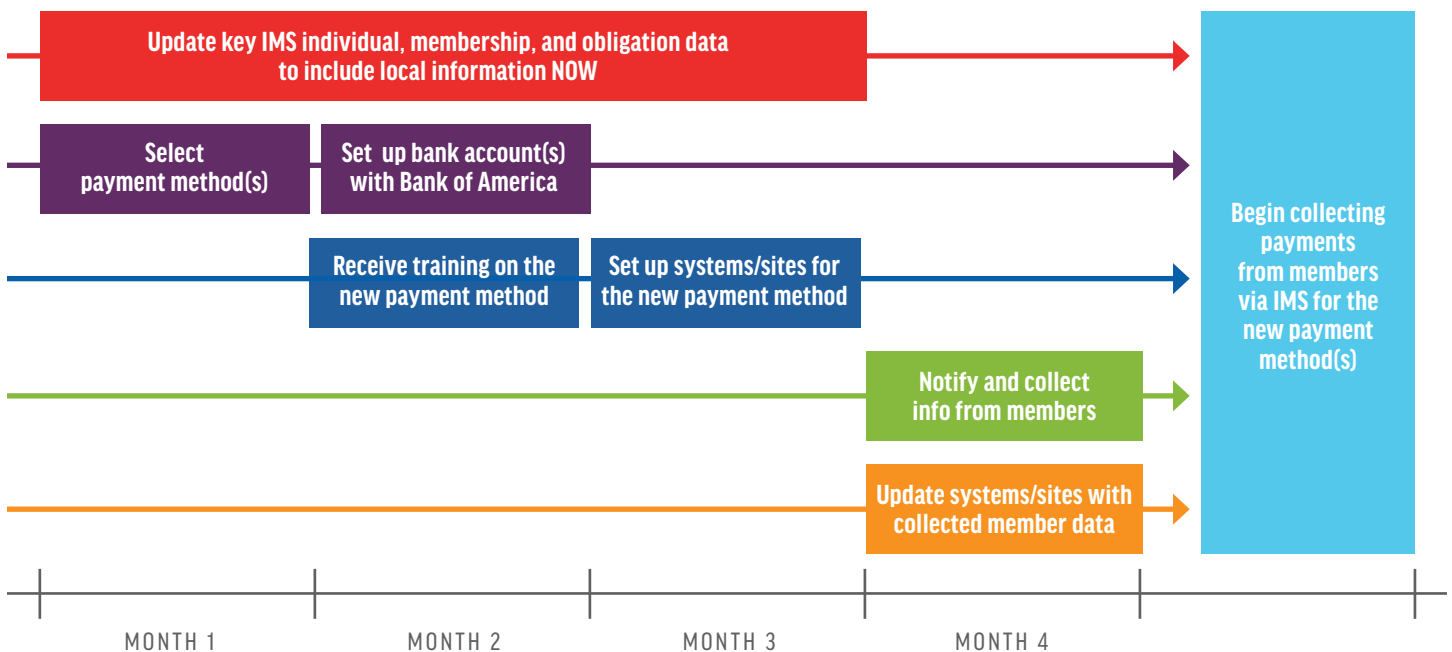
In order to launch your eDues platform, you will need to know the local dues amounts for every local in your state—collect this information alongside district pay schedules and contact information for local leaders.

Local dues amounts: This ensures the eDues system can charge members correctly for local dues.

District pay schedules: This will allow you to align dues draft dates with members' payday, reducing payment rejections.

Local leadership: Make sure you have the contact information for the local president, as well as contact information for all building reps, the treasurer, and the membership chair. Ensure that the roles in IMS are current and accurate.

4-MONTH TIMELINE TO SET UP AUTOPAY ON EDUES



For more information, check out the eDues Handbook in [Appendix B](#), or reach out to your MMS state contact.

Tactic 2: Payment methods

Before launching your campaign, decide which payment methods your affiliate will accept and on what terms.

EFT	CREDIT/DEBIT CARD
<ul style="list-style-type: none"> • \$0.03 - \$0.05 per transaction • \$2.00 return fee per transaction paid • 80% of account updates handled automatically • 1% rejection rate • Lower “maintenance” costs, as fewer members change bank accounts than have expired credit cards that need to be chased down (even after the “Auto Updater” program) 	<ul style="list-style-type: none"> • \$0.09 per transaction • Fees and points cost 2%-4% of transaction value • No return transaction cost • NEA is enrolled in the credit card “Auto Updater” program, used to reduce the number of payments processed against “bad” cards (e.g., expired, etc.) • 10% rejection rate • Lead time is slightly longer due to the setup with the credit card processing vendor • Most members are more willing to give credit card information than banking information • Our research indicates that slightly more members will flip if given the option to pay with credit card

Affiliates are normally able to push EFT rejection rates down to about 1%. However, rejection rates for credit card payments will always be much higher, at around 10%.

As a result, credit card payments cost ten times more in staff time devoted to chasing rejected payments, in addition to their significantly higher fees. For these reasons, we recommend pushing members away from credit card payments and towards EFT.

While there are a number of ways to encourage members to pay with EFT, many affiliates have opted to allow for 10 or 12 monthly payments with EFT, while requiring a single lump-sum payment for those paying via credit card. This approach discourages members from paying with credit card while reducing the amount of staff time spent chasing credit card payments.

Tactic 3: Use IMS email notifications

IMS email notifications are an excellent way to keep members informed on the status of their membership and dues payments, while complying with legal requirements for collecting union dues. We recommend setting up the following notifications.

EMAIL COMMUNICATIONS THROUGH IMS:



- ✦ Successful account information and account update
- ✦ Enrollment confirmation
- ✦ Payment notification
- ✦ Failed payment notification
- ✦ Refund notification
- ✦ Status sheet (sent before first deduction)
- ✦ Annual notice of dues rates
 - Members who use AutoPay must get notice of changes in their annual obligation, periodic amounts, and payment schedule.

Questions? Reach out to your MMS State Contact in [Appendix A](#).

Tactic 4: Routinize data cleansing

Clean and accurate lists are absolutely critical to converting your members and managing dues collection via AutoPay. Without strong lists, your conversion campaign will struggle to reach all members, and chasing rejected payments will be challenging.

Data cleansing is a cycle—not a one-time process. Good lists require constant care and attention. Take care of your lists, and they will take care of you! Before beginning your AutoPay campaign, take time to assess your lists by conducting a Membership Data Audit.

MEMBERSHIP DATA AUDIT



- ✦ For all the member records in your system:
 - What percentage have personal email addresses?
 - What percentage have home addresses?
 - What percentage have cell phone numbers?
 - How many members are not coded to a worksite in IMS?
 - How many members have a non-deliverable home address or personal email address?
- ✦ Worksite information:
 - What percentage of worksites have building reps identified?
 - Does the list of worksites in IMS contain all the worksites in your state?
- ✦ Local Leaders/Roles information:
 - What percentage of locals have a Local President identified with complete contact information in IMS?
 - What percentage of locals have a Membership Chair and Treasurer identified with complete contact information in IMS?
 - What percentage of worksites have a building rep listed with complete contact information in IMS?

After completing a Membership Data Audit, work to verify and update contact information for all members and local leaders. Use all possible channels of communication to reach members to update/verify their contact information.

A SURROUND-SOUND APPROACH FOR UPDATING CONTACT INFORMATION

1. **Postcards:** Send postcards to members asking them to record their contact information, and provide a link for them to do it themselves.
2. **Email Campaign:** Run an email campaign urging members to update their contact information!
3. **Telephonic Organizing Campaign:** Use a Telephonic Organizing campaign to have all members who did not fill out postcards or respond to emails update their contact information through a YRO survey!

Tip: Get creative! Members are more willing to update their contact information if it is tied to something interesting, such as a bargaining survey or digital birthday card! Attention-grabbing tactics that feel personalized work best.



USING A KEY-DATE APPROACH TO MAINTAIN CLEAN LISTS

Maintaining clean lists requires more than just asking members to update their contact information. AutoPay affiliates must keep a tight handle on who their members are, how to contact them, and if they will be retiring or moving to a new district.

Data cleansing should follow an annual cycle based on Key Dates. Ahead of each Key Date, work to maintain the accuracy of your lists.





“At MAE, the membership renewal packet is more than just an envelope of documents—it’s a vital part of our culture. By making it a consistent priority, we’ve embedded the importance of maintaining up-to-date member contact information into our everyday practices, ensuring no member is lost in the shuffle.”

**—Teresa Y. Robinson, *Director of Field Services and Membership,*
*Mississippi Association of Educators***

In Mississippi, all members receive a membership renewal packet in the mail each July. The packet contains a “change form” that members fill out in order to update their contact information, or indicate that they will be retiring or transferring districts/worksites.

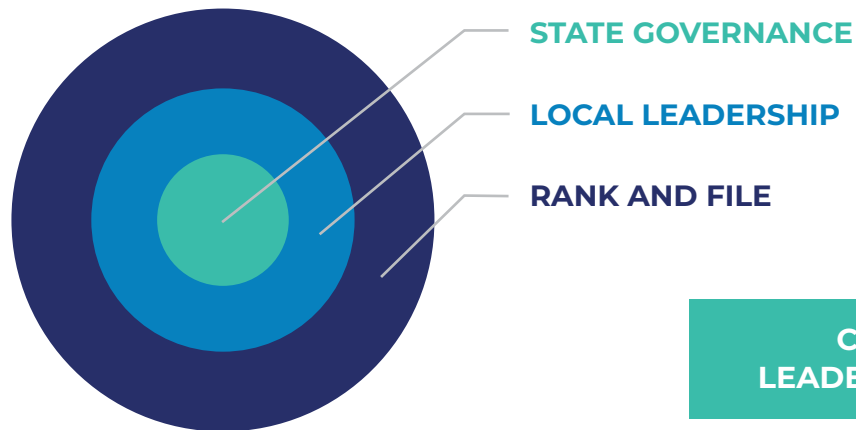
There are two main reasons why this tactic is effective for MAE. First, members know to expect their packet because leaders, staff, and volunteers take every opportunity to discuss it, from the moment a new member signs their application. Second, the packet includes things that members want, such as information on accessing member benefits, their membership cards, and liability information, ensuring members will not ignore the packet.

Questions about data cleanse? Reach out to your state’s NEA360 Adoption Specialist (Contact information can be found in [Appendix A](#)).

Key Strategy 2: Prepare your leaders, locals, and allies

Tactic 1: Build governance buy-in

Building governance buy-in is key to a successful AutoPay campaign, especially if you are pursuing a proactive strategy. Build buy-in at the highest levels before working outward, as shown in the graphic below.



CONVERT LEADERSHIP FIRST!

Governance leaders should be the first to convert to AutoPay. After they work through the process themselves, train all governance leaders on 1:1 conversations for converting members. Then, have local presidents convert before converting their leadership teams.

Begin with your state's officers and Board of Directors. Take time to meet and clearly articulate the real implications of losing payroll deduction on the organization's budget, density, power, and priorities. Understand the key priorities of governance in your state and establish the loss of payroll deduction as a direct threat to those specific priorities.

Remember, the threat should only be half the picture. Focus also on how your conversion campaign is an opportunity to strengthen your union by re-engaging with members, affirming their commitment to the vision of our union, and developing new structures and union leaders. Introduce proactive conversion as the best strategy to turn this threat into an opportunity.

Tip: Effectively managing AutoPay dues collection requires a clear cancelation policy for non-payment of dues. Begin preparing your Board to develop this policy.

Tactic 2: Protect PRD in CBAs or standalone agreements

In states with mandatory or permissive bargaining rights, local unions can bargain provisions that extend after a ban comes into effect, protecting payroll deduction until the bargained provisions expire. Use this tactic to secure additional time to convert members, prioritizing conversion campaigns in locals without such protections.

CONDUCT A CONTRACT AUDIT

Most states that have banned payroll deduction have included provisions in their laws stating that if there is a collective bargaining agreement in effect providing for payroll deduction, it may continue until the CBA expires, but may not be modified or extended once the law takes effect. As a result, local unions should seek to extend existing provisions, or bargain new ones, before the law takes effect. This analysis will help establish a bargaining strategy and inform the prioritization of locals for conversion efforts.

For each collective bargaining agreement reviewed, evaluate the strength of the payroll deduction provision using NEA's Model Payroll Provisions ([Appendix C](#)) and note the provision's expiration date.

BARGAINING GUIDANCE FOR AFFILIATES FACING PRD BANS

Locals with payroll deduction provisions that could be improved	State affiliates should work with local leadership to bargain stronger PRD provisions based on NEA's model language (Appendix C). If a PRD ban is likely, locals should be encouraged to extend protections for payroll deduction as long as possible by elongating the duration clause, pending any statutory requirements regarding the life of a collective bargaining agreement.
Bargaining locals with no payroll deduction provisions	State affiliates should work with local leadership to bargain PRD provisions based on NEA's model language (Appendix C). If a PRD ban is imminent, consider pursuing mid-term bargaining to add these provisions.
Locals with bargaining rights but no contract	State affiliates should work with local leadership to explore the possibility of entering into a single-issue contract with the employer protecting PRD. For a sample cover letter and contract, check out Appendix D , Attachments B and C.

When negotiating standalone agreements to protect payroll deduction, work with your legal team to ensure that agreements will be enforceable.

Many district superintendents do not have strong opinions on payroll deduction. Have a priming conversation with the superintendent before pursuing a standalone agreement. Additionally, look for allies within superintendents' organizations and school boards who can help persuade their colleagues to support you.

Looking for more information? Reach out to your Collective Bargaining and Member Advocacy Department contact (found in [Appendix A](#)) or check out Appendices [C](#) and [D](#), which discuss this tactic in greater detail.

Tactic 3: Reconnect with members before making the conversion ask

Our research tells us the most challenging members to convert are those who struggle to see the value of the union. Converting these members requires engaging with them on their priorities and rearticulating the vision of the union.

Before you convert, local leaders and volunteers should engage with as many members as possible, especially in worksites where the local has been less visible. Have local leadership conduct 1:1 conversations with members, asking them what they want from their union. Think of how the union might deliver on these priorities. Do members want to take action in their workplace? Do they want a professional development training? Consider recording their responses in a Year-Round Organizing card.

Year-Round Organizing Cards are a Good Touchpoint

Available through the Year-Round Organizing program, YRO cards are issue surveys that allow members to indicate how they might want to be active in our union. Paired with in-person 1:1 conversations, YRO cards are a great way to re-engage with members.

TELL US MORE
As an educator, you have a close-up view of the opportunities and challenges facing our schools. These questions will help us collectively win for our students and provide you with the tools you need to succeed as an educator.

1. What year did you enter the profession? (YYYY) _____

2. Describe your membership status:

I am already a member here. I was a member at my last district/employer and I want help transferring my membership.
 I am not a member and would like more information about joining.

3. Your union provides training, support, and tools to ensure your success. What would you like to learn more about?

Building relationships and meeting students' social-emotional needs Family and community engagement Instructional and classroom strategies
 Health and safety Social justice and racial equity Technology Reducing student debt Saving money with NEA Member Benefits

4. When we work together, we have a stronger voice. How would you like to participate in your union? (Mark all you are interested in)

Membership, Leadership & Advocacy
Calling to collective action, meeting one-on-one to help convert for members. For example, participating in an organizer, building relationships, or another association leadership role.

Collective Action
Working on the front end about bargaining, meet & confer, or other workplace actions.

Leading Our Professions
Supporting members to grow in their professional practices.

Political Activism
Working with the union to elect an education candidate from both parties when the local school board is the White House.

School Funding & Education Policy
Working to increase education funding at the school, district, and state.

Thinking About It...
I'm not ready to volunteer right now but I'm looking forward to helping out.

Tactic 4: Work in coalition to defend labor rights



“The Utah School Employees Association (USEA) quickly saw the need to move to coalition work to defeat the attacks on labor in our last legislative session. As a coalition, we activated our members in targeted districts to have one-on-one conversations with their legislators. Our members were also asked to email and call into these same targeted districts. Without the support of all of labor, we couldn’t have stopped this bill—together we killed it.”

—Mike Evans, *President, Utah School Employees Association*

Beating back payroll deduction bans and other anti-union legislation is best done in solidarity with other labor unions. Start meeting regularly before the session begins to discuss priorities, threats, and opportunities. Create a coalition, and branded materials, that can be used to distribute information from a united labor table to legislators. The coalition should hire lobbyists, identify key legislators, and share target sheets at every meeting. Legislatures have tried to carve out police and firefighters from the most detrimental effects of legislation, but if the labor table stays united, bad bills can be defeated for the benefit of all unions.

Lessons learned from affiliates who have successfully defeated payroll deduction bans:

- ✦ Work in coalition
- ✦ Determine who has the ear of the key legislators
- ✦ Bring in members from strategic districts to tell their stories
- ✦ Continually revise talking points with coalition as legislation changes
- ✦ Email, Hustle, and phone bank members strategically throughout the campaign

Members are our most important messengers. Successful coalitions have brought in members on a weekly basis to meet one-on-one with key legislators. Best practice is to meet with members beforehand, review regularly updated talking points, and to debrief with them afterwards. Building strong coalitions and engaging members is the strategic path for winning pro-labor legislation.

Key Strategy 3: Develop a surround-sound plan

Tactic 1: Keep members informed about incoming legislative threats

According to our research, over half of our members have heard “just a little” or “nothing” about the bills that eliminate payroll deduction. What’s worse, members who have heard little or nothing feel most negatively about being asked to make the flip.

In states facing immediate legislative threats, educate members about the legislation proposed by anti-public education politicians and explain how to protect their membership. Emphasize that they will lose their membership if they don’t switch to AutoPay. Stress that enrollment is safe and secure and remind members that the union protects them and their students.

In states pursuing a proactive strategy, be careful not to rely too heavily on threat messaging. If the threat dissipates, members may no longer see the reason to convert. Instead, focus on the advantages of protecting their union membership.

Tactic 2: Use research-backed messaging

NEA conducted message research to determine the most effective messaging for converting members off of payroll deduction. This research informs the messaging guidance featured in this playbook.

SAMPLE TALKING POINTS

- ✦ Your union membership protects you from things like unfair retaliation and dismissal. But now you need to enroll in AutoPay to protect your membership because anti-public education politicians are attacking our union.
- ✦ Anti-public education politicians want to hurt our union and shrink our membership, which means lower salaries and benefits, fewer protections, and losing our voice for students in important conversations.
 - They eliminated members’ ability to pay through automatic dues deduction.
- ✦ It’s easy to protect your membership by enrolling in AutoPay, and the process is safe and secure.
 - Members who have already renewed their membership say it was quick and easy.
- ✦ Members who protect their membership through AutoPay will pay the same amount. The process is simple, and your bank information will be secure and remain private.

DOS AND DON'TS

DO	DON'T
DO start with the fundamentals: Members need to enroll in AutoPay to stay a part of the union. Anti-public education politicians are eliminating/have eliminated members’ ability to pay through automatic deduction.	DON'T say that AutoPay is a way to modernize or “update and upgrade” paying our dues. Similarly, don’t remind members that many of us pay other bills automatically from our bank accounts.
DO stress the value of the union by talking about what is lost if anti-public education politicians weaken the union: reduced bargaining power, lower pay and benefits, less protection, and policies that hurt our schools.	DON'T focus on who has access (limited union staff) or who doesn’t have access (administrators/school boards) to payment information.
DO say “AutoPay” or simply “Renewal” or “Membership Renewal.” Refer to “protecting your membership.”	DON'T say “eDues,” “direct pay,” or “EFT,” and do not say “recommit” or “recommit your membership.”

Tactic 3: Use Hustle, email, and telephonic organizing to complement field work



“Establishing multiple modes of communication between the members, OEA, and the local is key. We have a sequential communication approach that begins one month out from the first site visit, which includes OEA, the local leader, and building reps, reaching members through email, face-to-face, workplace postcards, and Hustle.”

—Rhonda Harlow, Associate Executive Director, Oklahoma Education Association

While we can't expect digital tools to convert a large percentage of membership, building a strong surround-sound strategy can go a long way in supporting the in-person work and raising awareness about the switch to AutoPay. Use these tools to complement your field strategy, like by sending Hustle messages to members ahead of a worksite visit.

When building a surround-sound plan, don't just focus on what will be sent out from the state level. How can partners like local presidents or building reps contribute to your surround-sound campaign? Using a variety of media from different senders will help your message stick.

Our research shows that many members are unaware of payroll deduction bans. Members who are unaware of bans feel more negatively about flipping. Make sure your members are well informed. Additionally, think about how you can use your surround-sound strategy to identify volunteers to help in the conversion efforts. How can members who want to help contribute to the campaign? If the communication includes a link to the eDues platform, include the Member ID number to help members make the switch.

Telephonic organizing can be a useful tool at many points during your AutoPay campaign. In addition to calling members to convert them over the phone, our call center can also update contact information, identify new leaders/activists, and help alert members to the loss of payroll deduction through phone calls. For more information, please reach out to yro@nea.org or see [Appendix E: Telephonic Conversion Supports](#).

SUPPORTING YOUR IN-PERSON ORGANIZING WITH DIGITAL SURROUND SOUND

BEFORE			IN PERSON	FOLLOW-UP
Email from State: What is the legislature doing? Update contact/worksite info!	Email from Building Rep: Announce a 10-minute meeting to convert	Email from Building Rep: Don't forget about tomorrow's meeting!	Worksite Conversion Meeting!	Email from Building Rep: If you couldn't make it, I'll find you to convert!!
Email from State: What's AutoPay? Why should I convert?	Email from Building Rep: Conversion team is coming soon!	Hustle: Conversion team at your school tomorrow! *include NEA ID #	Worksite Visit!	Building Rep: 1:1 conversations with unconverted members
Calls: Alert members to threat, update contact/worksite info!	Hustle from Local: Time to convert! Interested in volunteering?	Email from Building Rep: I'll be coming to see you to talk about AutoPay!	1:1 Conversations with Building Rep	Email from Building Rep: Thank you for converting! Please remind your friends.

INSERTING NEA ID NUMBER INTO COMMUNICATIONS

In order to convert to AutoPay, members will need their NEA ID number. Fortunately, this number can be inserted into communications like Hustles or emails through a merge field. For help setting up a merge field for NEA ID, contact Justin Conley at jconley@nea.org

BASIC AUTOPAY MESSAGE

We all want someone to have our back, and as educators, we know our union membership protects us. Together, our voice is stronger for our students, school funding, and better pay and benefits. It's important to protect our membership.

Our power depends on our numbers. The more members in our union, the more collective power we have to bargain for the things that matter to us, like our students and schools. That's exactly why anti-public education politicians are attacking our union.

Anti-public education politicians are trying to weaken the union, which will hurt our bargaining power, lower our pay and benefits, decrease our union protection, and allow these politicians to drive policies that hurt our students, schools, and classrooms.

If we let them win, we lose our power to fight for decent salaries and benefits, protect educators from unfair treatment, and stand up to these politicians' overreach into the classroom and our students' education. By enrolling, we protect our ability to have input on the decisions that affect our jobs, students, and schools.

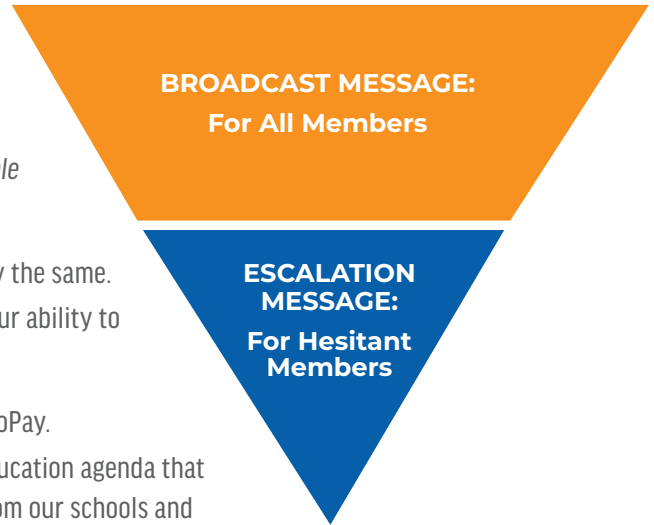
We are standing together and building our numbers so we have the collective power to bargain for the things that matter to us and stand up to these politicians' overreach into the classroom. Every one of us should renew with AutoPay to protect our union membership. It's easy to enroll, and our information stays secure.

Broadcast and Escalation Messages

CORE BROADCAST MESSAGE

The most effective message to persuade most members to switch is a simple one that should be shared broadly by state affiliates and locals through all channels (for example: emails, social postings, worksite flyers, direct mail, meeting announcements, phone banks, etc.). Many members will need multiple reminders to complete the AutoPay switch.

- ✦ You need to switch to AutoPay to stay in the union. Your dues will stay the same.
 - Anti-public education politicians are eliminating/have eliminated our ability to pay our dues through automatic payroll deductions.
- ✦ Protect your union membership that protects you by switching to AutoPay.
 - They want to weaken our union so they can push an anti-public education agenda that hurts us and our students—like vouchers that take money away from our schools and reduce the pensions we've earned.
- ✦ Switching to AutoPay is **easy, quick**, and a **one-time change**.
 - It's a simple switch that only takes a few minutes. The amount stays the same, and our dues will still be deducted on payday. Sign up once and you're done.
- ✦ Protecting your membership is the only way to stop anti-public education politicians from weakening our union.
 - Being an educator is tough, and to earn better wages and benefits, we need to stick together.



CORE ESCALATION MESSAGE

*Most members will need multiple reminders and nudges to switch. Other members need to have their concerns heard and hear more about the value of their union membership to switch. These members need an overall retention message—not related to the specifics of AutoPay—because their hesitation to switch is not rooted in concerns about the process. Customize 1:1 scripts with **important wins that affect members' daily lives—the tangible benefits of union membership**.*

- ✦ Your union has your back, and your union membership protects you.
 - Even great educators sometimes find themselves unfairly attacked or accused, but our union stays on your side. High-quality liability insurance gives us access to first-rate attorneys to resolve the issue.
- ✦ Our union fights for better wages and benefits that we deserve and improves our daily lives by winning **dedicated planning time, bathroom breaks, and extra pay for extra duties**.
 - We do our jobs to help kids, but too many politicians think becoming a teacher or support staff means taking a vow of poverty.
- ✦ Our power depends on our numbers. The more members like you in our union, the stronger a voice we have.
 - Anti-public education politicians want to weaken our union, and weaken our voice, for their own benefit.
- ✦ It will be open season on educators like us if we leave the union—we'll lose our power to fight for the salaries, benefits, and treatment we deserve.
 - Politicians who don't know anything about our jobs already make too many decisions about our schools. You work too hard to let them have even more control over your job or your pension.

Sample emails, Hustle scripts, and posts

As mentioned in the section above, there are two core steps to your AutoPay communications campaign: the core broadcast message and the core escalation message.

Digital messaging should reinforce these steps by educating members on three main points:

- ✦ Anti-public education politicians either have passed or are threatening to pass legislation that directly threatens their union membership.
- ✦ They can protect their membership through one easy, secure, and one-time change: switching to AutoPay.
- ✦ **If they need follow up:** Remind them of the value of union membership; that we are standing together and building our numbers so we have the collective power to advocate for the things that matter to us, from our students to school funding to better pay and benefits.

Use the sample scripts below to share these important messages with your members!

CORE BROADCAST MESSAGE

These core messages are designed for broad sends to membership. The goal of this step of communications is to make members aware that they need to switch to AutoPay to stay in the union.

While most members will be convinced to act after receiving these messages, they will likely need to receive them several times as reminders.

Sample Email:

SUBJECT: Protect your union membership

PREHEADER: Make the switch to AutoPay

BODY:

[First Name or Friend],

As educators, our voices are stronger when we speak together. The more members in our union, the more collective power we have to advocate for the things that matter to us, like what's best for our students and schools.

That's exactly why anti-public education politicians are attacking our union—to weaken educator voices for their own benefit.

[Protect your union membership by signing up for AutoPay. The process is safe, secure, and easy.](#)

These politicians have recently passed limits to restrict the methods our union can use to collect member dues.

Due to this legislation, you must switch your dues to AutoPay by [DATE] in order to maintain your membership in our union.

[Make sure anti-education politicians can't take away your union membership.](#)

Here's what you'll need to switch to AutoPay:

- Make sure you have your credit card or bank information ready
- *[Include any information needed for log-in to your dues collection system. For AutoPay, that is NEA Member ID and ZIP code.]*

[< Sign up for AutoPay today >](#)

AutoPay is a convenient way to pay dues through automatic deductions from a checking or savings account, credit card, or personal/bank check. AutoPay is done through a secure bank site, keeping your financial information private and safe.

[It's a simple switch that only takes a few minutes. The amount stays the same, and our dues will still be deducted on payday.](#)

[Sign up once and you're done!](#)

Switch your payment method to AutoPay today so that we can continue to create the working conditions we need and the learning conditions our students deserve.

Please let us know if you have any questions about AutoPay or why switching your payment method is important. Just reply to this email and we'll connect with you!

In solidarity,

[Name]

Sample Hustle Script:

TYPE: Share a Link Goal

LINK: <https://edues.nea.org/eDues/righthere.jsp>

SCRIPT: <Member Name>, I'm <Organizer Name> w/NEA! Changes in state law have put your union membership at risk. Will you act to protect it? Text STOP to quit.

IF YES: Great! Switching to AutoPay ensures no one can stop you from paying your union dues. Signing up is safe, secure, and easy: <Link>

IF NO: I understand, <Member Name>. Are there any questions I can answer about AutoPay that would make you ready to switch and protect your union membership?

***Important note:** Be sure to have NEA ID and ZIP code available.

Sample Social Media:



Twitter/X

When educators come together, we are powerful.

Protect your union membership by taking proactive action to ensure no one can stop you from paying dues. Sign up for AutoPay today: <Link>



Instagram

🇺🇸 State legislators have restricted the methods we can use to collect member dues.

This is a direct attack on our ability to advocate for our students, our schools, and each other.

We need your help. Update your payment method today to protect your union membership and help us ensure these restrictions don't stop us from advocating for the working conditions we need and the learning conditions our students deserve. Click the link in our bio to update to AutoPay today!



Facebook

You can act today to keep our union strong. Changing your dues payments to AutoPay is a safe, secure, and convenient way to protect your membership and ensure we can keep advocating for educators across our state.

Make the switch today: <Link>

Sample Website Copy:

TITLE: Protect Your Union Membership

SUBHEADER: Anti-education politicians are trying to weaken our union by mandating that educators switch from automatic payroll deduction by [DATE] in order to maintain their union membership. Luckily, switching to AutoPay is a one-time process that is easy, quick, and secure.

COPY:

Our union membership gives us a collective voice to advocate for the things that matter to us, like our students and schools. Together, we have won changes across the state that improve our daily lives, from pay raises to protected planning time.

However, not everyone wants us to succeed. Anti-education politicians in our state see our union as a threat to their corporate donors and political future. They are using every tool to weaken our voices, including eliminating our ability to pay our dues through automatic payroll deductions.

Due to recent legislation, if you do not switch your dues payments from automatic payroll deductions by [DATE], your union membership will be canceled.

Updating your payment method to AutoPay helps us ensure anti-education politicians and their allies don't stop us from advocating for the working conditions we need and the learning conditions our students deserve.

[< Switch Your Payment to AutoPay >](#)

Switching to AutoPay is: Easy, Quick, and a One-Time Change.

AutoPay is a convenient way to pay dues through automatic deductions from a checking or savings account, credit card, or personal/bank check. AutoPay is done through a secure bank site, keeping your financial information private and safe.

It's a simple switch that only takes a few minutes. The amount stays the same, and our dues will still be deducted on payday. Sign up once and you're done!

Make sure anti-education politicians can't take away your union membership. Here's what you'll need to switch to AutoPay:

- Make sure you have your credit card or bank information ready
- *[Include any information needed for log-in to your dues collection system. For AutoPay, that is NEA Member ID and ZIP code.]*

[< Sign Up for AutoPay >](#)

Thank you for taking action to protect your union membership and ensure that we can continue to advocate for our future for years to come.

Need help or have questions about the switch to AutoPay? We're happy to chat! Contact us at [EMAIL ADDRESS] or call us at [PHONE NUMBER].

CORE ESCALATION MESSAGE

Most members will be convinced to switch to AutoPay through multiple reminders of the broadcast messaging (a mixture of online and in-person contact points is recommended). However, the remaining members will need more direct escalation messaging about the value of the union and why protecting their membership is important for their and their students' well-being.

These messages should be delivered in more direct ways than the broadcast messaging, with personal emails and Hustle outreach supplementing in-person outreach.

Sample Email:

SUBJECT: Together educators are stronger.

PREHEADER: Why your union membership is important.

BODY:

[First Name or Friend],

When educators come together, we are powerful. Our union membership gives us a collective voice to advocate for the things that matter to us, like our students and schools. We have won changes across the state that improve our daily lives, from pay raises to protected planning time.

[Insert example of a win from your state or local. Example: Here in South Carolina, hundreds of educators came together to advocate at the state capitol and won big! The legislature unanimously passed a bill providing six weeks of paid parental leave.]

The more members like you in our union, the stronger we are. Switching to AutoPay makes sure your voice is heard!

However, not everyone wants us to succeed. Anti-education politicians in our state see our union as a threat to their corporate donors and political future. They are using every tool to weaken our voices, including eliminating our ability to pay our dues through automatic payroll deductions.

Due to recent legislation, if you do not switch to AutoPay by [DATE], your union membership will be canceled.

< Sign up for AutoPay today >

Luckily, you can act today to protect your membership and the future of our work for public education by signing up for AutoPay!

Updating your payment method to AutoPay helps us ensure anti-education politicians and their allies don't stop us from advocating for the working conditions we need and the learning conditions our students deserve.

Your log-in information: *[Include any information needed to log in to your dues payment platform. For AutoPay, that is NEA Member ID and ZIP code.]*

AutoPay is a secure and private way to pay your union dues without depending on payroll deduction.

< Make the switch today >

Our opponents know that when we come together, we will win higher pay for educators, better learning conditions for our students, and the funding increases our schools need.

Thank you for taking action to protect your union membership and ensure that we can continue to advocate for our future for years to come.

In solidarity,

[Name]

Sample Hustle Script:

TYPE: Share a Link Goal

LINK: <https://edues.nea.org/eDues/righthere.jsp>

SCRIPT: <Member Name>, I'm <Organizer Name> at NEA! Following up, have you switched to AutoPay to protect your union membership?
Text STOP to quit

IF YES: Amazing! Our power depends on our numbers. Will you share the link to sign up for AutoPay with three of your colleagues?
<Link>

IF NO: No problem! Unless you switch to AutoPay by [DATE], your union membership will be canceled.
May I ask what is holding you back?

***Important note:** Be sure to have NEA Member ID and ZIP code available.

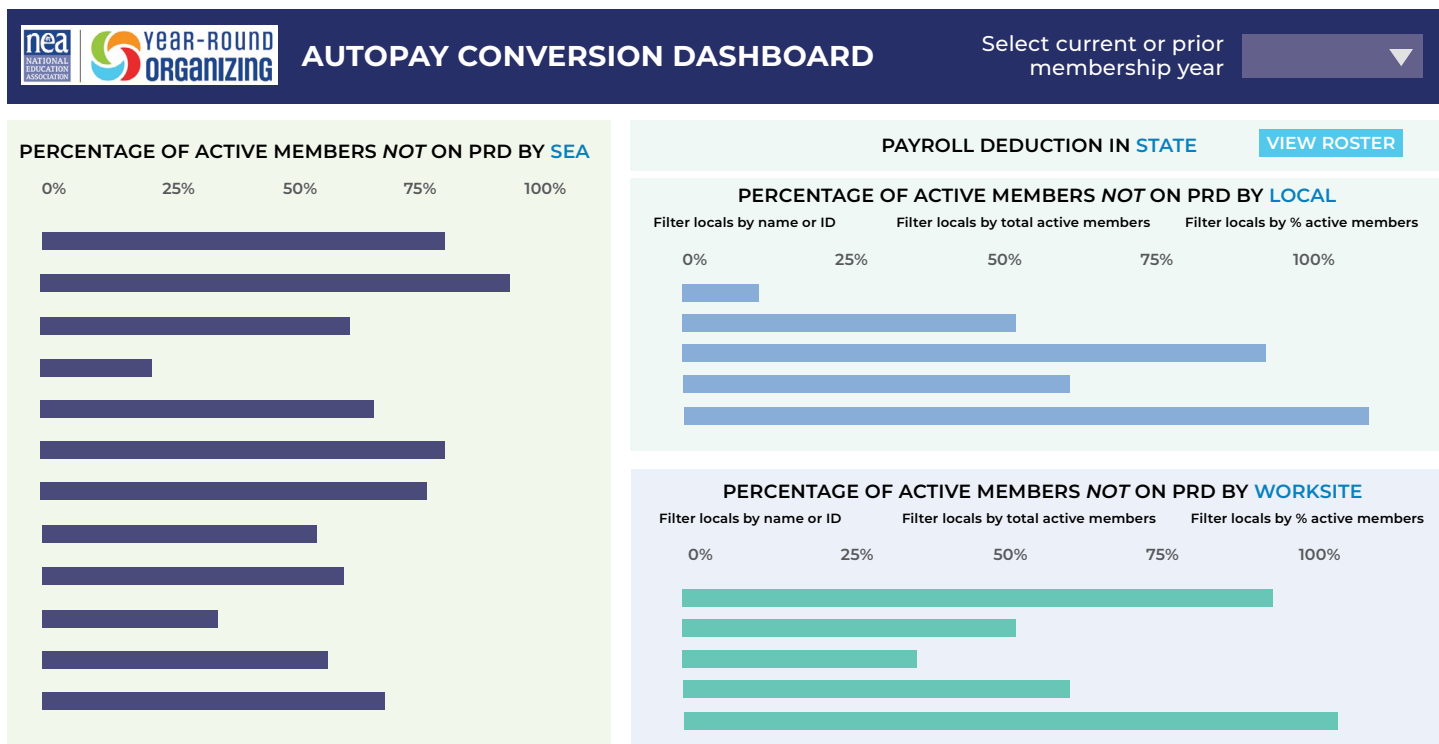
Key Strategy 4: Reach every member multiple times

Tactic 1: Empower field leaders with data

In order to maximize the efficiency of your campaign, it is vital that leaders have the necessary data. Provide those involved in your campaign, including field staff, governance, and building reps, with regularly updated lists of members who have not yet converted, including their contact information. Provide regular updates on the percentage of members who have converted statewide and in each local. By making this data easily available to people working on your campaign, you ensure that folks will always have the correct information when it comes to the status of the membership they are working with.

In doing so, please be vigilant to protect confidential information. Only provide necessary member information and remind staff and leaders to zealously guard that information.

GUIDE TO THE NEA AUTOPLAY DASHBOARD



Note: To protect sensitive information, we've included only a simplified version of the dashboard. To request full access, email toolsupport@nea.org.

The NEA AutoPay Dashboard is an excellent tool for checking on the conversion progress in your state affiliate, locals, and individual worksites. The data is updated on a weekly basis and reflects the percentage of members not on payroll deduction.

On the left side of the screen, click on a state's dark blue bar to show that state's locals and worksites. Using the sliders at the top of the screen, you can filter and sort locals and worksites based on their number of members and the percentage converted. From the dashboard, you can easily download rosters of unconverted members by local and worksite, with their ZIP code and NEA ID.

Access to the NEA AutoPay Dashboard is limited to staff only. If you'd like access, please email toolsupport@nea.org to request it.

Tactic 2: Assess your worksite structure

There are many ways to convert your membership to AutoPay, but using the worksite structure to make conversion asks is the most effective. Therefore, it's imperative to know where your worksite structure is the strongest.

Work with UniServ Directors to evaluate the worksite structure at the building level in each of their assigned locals. Use the [Building Rep Structure Assessment](#) to evaluate each building rep and determine what supports they may need to successfully convert their worksite.

Tactic 3: Convert through worksite structure

Use your worksite structure audit to allocate resources during your campaign. Wherever possible, have building reps convert the members in their worksites. Take some time to think through how building reps fit into your campaign. Have a plan in place to train building reps, and to intervene if they aren't meeting their conversion goals.

Show building reps where they can find lists of members who haven't converted and have them plan out how they will convert the entire worksite over time. Stress the importance of running a phased campaign at the building level. Most members don't understand what AutoPay is or why they need to convert. Our research shows they will be more receptive to flipping if they know why it's important.

Have building reps work to raise awareness among members with 1:1 conversations, meetings, emails, and/or texts before they start converting members. This is a great time to ask members to update their contact information or identify volunteers to help with conversion.

Tactic 4: Convert through worksite visits



“Membership is everybody's business! It is imperative that ALL staff be engaged in the conversion effort—make it part of your weekly/daily updates and briefings.”

—Terrance J. Gibson, Executive Director, Tennessee Education Association

Before a team arrives at the worksite, members should already be aware of the impending loss of payroll deduction and the need to convert their membership. Work with the building rep or the local president to create a plan to raise awareness. The week before the visit, let the members at the worksite know you'll be there. A few days before, text and email the members at that worksite to tell them where you'll be set up and for how long.

When you arrive, text the members to let them know you are there. If the administrator is friendly to the union, ask if an announcement can be made over the PA system. Find the building rep or another volunteer from the worksite, give them the list of members who haven't yet converted, and ask them to bring these members to your table.

Worksite Visit Tip! Engage with potential members at the worksite too. If potential members come through your area, talk to them about their priorities and the work of the union. Don't forget to bring membership forms!

This checklist includes everything you need to run a successful worksite visit.

(Continued on next page)

WORKSITE VISIT CHECKLIST



One Week Before the Visit

- ✓ The building representative should obtain a master calendar of teachers' planning times. The sign-up times should match class periods in 5-minute increments with as many slots as there are computers available at the visit.
- ✓ The building representative should email the membership at least three days prior to the visit announcing the worksite visit and encouraging members to make an appointment to convert.
- ✓ Obtain the most recent school roster with the added columns and alpha roster from the UniServ Director.

Night Before the Visit

- ✓ Send a message to the whole staff (not just members) letting them know where your team will be set up. Remind members to sign up for a time and to bring their bank account information. Encourage everyone to stop by and learn about membership.

During the Visit

- ✓ Arrive early so that you can connect and test all devices.
- ✓ If you were able to release the building representative for the day, have them check with members who did not sign up for a time.
- ✓ Send a reminder message to each member on your list letting them know where you are and how long you will be there. Remind them to bring their checkbooks or debit/credit cards when they come to meet with you.
- ✓ To reach all the members, stay for most of the school day.

After the Visit

- ✓ Send the building rep a list of all the members who did NOT convert during the visit. The building rep should follow up with those members to help them switch to AutoPay.
- ✓ Give the building rep the names of any potential members with whom you spoke who have not yet joined.

WHAT'S IN THE BINDER?

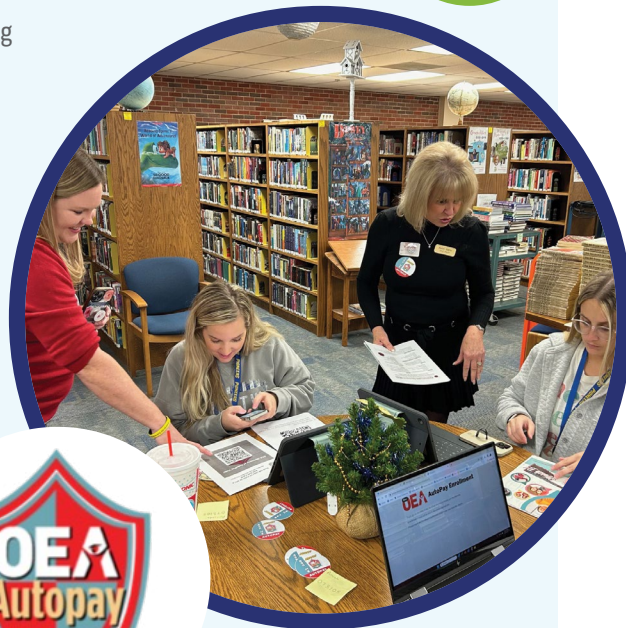


Organizers at the Oklahoma Education Association have had great success putting together binders filled with helpful materials for site visits.

- ✦ Two copies of membership rosters for the local with Member ID numbers, one sorted by name and another by worksite, in case a member has recently switched worksites
- ✦ Instructions with helpful tips for site visits
- ✦ AutoPay sign-up forms and, if applicable, forms to terminate payroll deductions
- ✦ Membership forms for new members
- ✦ Schedule for the site visit

Want to learn more?

Check out the AutoPay Resources folder at nea.org/yroresources



Tactic 5: Convert through home visits

In cases where a school administrator may not allow a worksite visit, or worksites have closed for the summer, it is necessary to convert members by conducting home visits.

Before you canvass, make sure that you have buy-in from local leadership and enough volunteers to get the job done. While staff can be great coaches, it's important for members to see their colleagues at the door. Be sure to have canvassers who can speak Spanish—if you have limited Spanish-speaking volunteers, have a Spanish speaker at headquarters whom teams can call for translation help. Make canvassing fun! Have teams spend time getting to know each other with icebreakers.

Thoroughly train your canvassers on 1:1 conversations, your conversion message, and the conversion process. Emphasize safety when canvassing: never knock on a door alone, and if a house looks unsafe, don't approach. Make sure to wear shirts or badges from the local when canvassing. If the member doesn't come to the door, have generic materials in Spanish and English to leave behind.

Key Strategy 5: Strengthen payment capture systems

Glossary

Payment Capture	Payment capture occurs when dues leave a member's account and are transferred to the union successfully.
Rejected Payment	A rejected payment is when an EFT or RCC charge does not go through. Most common causes of payment rejections are: <ul style="list-style-type: none"> • Insufficient funds/credit limit reached • Bank account closed/credit card expired • Member disputed the charge
Payment Chase	Payment chase describes the multi-step system for collecting dues from members who have had a rejected payment.
Reconciliation	Reconciliation is the process of matching individual dues payments with money received to ensure current members' accounts are complete and accurate.

BUILDING AN EFFECTIVE PAYMENT CAPTURE SYSTEM



Tactic 1: Reduce rejected payments

For EFT and RCC payments, we strongly recommend aligning the draft schedule to members' paydays. When they first begin collecting dues via AutoPay, many affiliates shy away from having multiple payment schedules in order to minimize the logistical burden on membership processing staff. However, running multiple payment schedules aligned with members' paydays significantly reduces rejected payments, minimizing time-intensive payment chase work. The most effective payment chase strategy is to reduce rejections!

By following these steps, many affiliates have been able to reduce EFT rejection rates to around 1%.

It is more difficult to reduce rejection rates for credit card transactions. The easiest way to reduce credit card rejections is to spread the dues obligation over fewer transactions, minimizing opportunities for a failed payment. For example, an affiliate could offer quarterly payments for credit card payers, while offering monthly draws for EFT payers. Some affiliates have had success limiting credit card payers to a single draw date for the entire annual dues obligation.

***Tip:** 1-2 weeks before drafting members' accounts via EFT, request a pre-note from NEA. The pre-note will check for closed bank accounts before the payment draft, allowing staff to rectify the issue with the member before a payment is rejected.*

Tactic 2: Reconcile payments and membership rosters

Once members have been converted to AutoPay, it is critical to ensure that all payments are applied to the correct member and local dues are forwarded to the correct local. Reconciliation is the process of matching payments to members and identifying rejected payments.

It is important to leave time to verify local rosters at the beginning of the school year before payment drafts begin. Verifying rosters before the first EFT or credit/debit charge will help prevent double charging members who have transferred locals or mistakenly charging members who have retired.

Since AutoPay takes the employer out of the dues collection process, systems must be in place to continually update when member's dues obligation ends, either because they have transferred, retired, or resigned. Under payroll deduction, if a member left a district or retired, the payments would be stopped automatically by the employer. However, when collecting dues via AutoPay, members will continue to be charged until the membership department is notified that they have left the district or retired. Local leaders, Association Reps, and other governance members should institute regular roster validation and develop procedures to notify membership departments when members are transferring locals or retiring.

Since membership departments may need to reach out about payment information, work locations and Association roles should be updated and stored in a centralized database such as NEA360.

*Looking for more information on how to maintain accurate membership rosters? Check out **Key Strategy 1, Tactic 4: Routinize data cleansing** (Page 5).*

RECONCILING EFT RETURN STATEMENTS

Affiliates will receive an EFT Return Statement from Bank of America listing the successful and rejected payments, as well as any closed bank accounts. This report, coupled with receipts from IMS FRS and reports from IMS Custom Extracts and MRA, will provide membership processors and financial staff with the information that they need to reconcile payments to members and identify members whose payments were rejected. It is imperative to notify members of missed payments as soon as possible so that they can provide updated information to stay current with their membership dues obligation.

BUILDING TRUST WITH LARGE LOCALS

Many large locals resist AutoPay because of changes in their revenue flow. With AutoPay, dues are collected at the state level before being disbursed to the local. Sending FRS receipt reports from MRA, showing how much money the state received and how much has been sent to the local and to NEA, can help to build trust and overcome resistance with large locals. Additionally, state affiliates should collaborate with locals to determine disbursement dates for dues.

SAMPLE RECEIPT

Receipt Search

Owner Org: <input type="text" value=""/> Billable Party: <input type="text" value=""/> <input type="text" value=""/> Mshp Year: <input type="text" value=""/> Payment Category: <input type="text" value=""/> Receipt Amt: <input type="text" value=""/> Receipt Description: <input type="text" value=""/>	Reference #: <input type="text" value=""/> Reference Date: <input type="text" value=""/> Process From Date: <input type="text" value=""/> Process To Date: <input type="text" value=""/>	Individual ID: <input type="text" value=""/> Batch #: <input type="text" value=""/> Batch Date: <input type="text" value=""/> Batch Desc: <input type="text" value=""/> Pymt Trans ID: <input type="text" value=""/>
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Pay Category	Indv ID	Pymt TransID	Name	Amount	Ref #	Ref Date	Mshp Yr	Descriptions	Batch #	Batch Date	Batch Description	Process Date
EFT	001	12345	Joe	\$4.75		01/01/25	2025	Sample	67890	01/01/25	EFT Deposits	01/01/25
EFT	002	12346	John	\$4.75		01/01/25	2025	Sample	67890	01/01/25	EFT Deposits	01/01/25
EFT	003	12347	Jim	\$4.75		01/01/25	2025	Sample	67890	01/01/25	EFT Deposits	01/01/25
EFT	004	12348	Jane	\$4.75		01/01/25	2025	Sample	67890	01/01/25	EFT Deposits	01/01/25

Tactic 3: Systematize payment chase

MEMBERSHIP PROCESSORS SHOULD HANDLE PAYMENT CHASE

Payment chase—the process of collecting dues from members after their payment was rejected—is a significant challenge that comes with collecting dues via AutoPay.

Payment chase processes should be centralized and handled by your affiliate’s membership processing staff for several reasons:

- 1. Efficiency:** Membership processors are uniquely equipped to communicate with members and make immediate changes directly in IMS, eliminating chains of communication that can increase the risk of errors.
- 2. Communication:** Membership processors understand how to handle sensitive, confidential matters with members in a professional and respectful way.
- 3. Simplicity:** Assigning this work to a membership processor, instead of a complex patchwork of staff and leaders, greatly reduces the risk of error and ensures that all missed payments will have a timely follow-up.
- 4. Compliance:** There are legal rules around collecting rejected EFT and RCC payments. By centralizing this work to a smaller group of staff who can be more easily trained, your affiliate can minimize legal risk.

EFFECTIVE PAYMENT CHASE SYSTEMS

The best payment chase systems communicate with individual members using multiple methods, while ensuring local leadership is aware of membership status.

Most affiliates bifurcate their approach to payment chase based on whether the payment was rejected because of (1) a closed bank account or expired credit/debit card and (2) insufficient funds or exceeding one’s credit limit. This is because insufficient funds or credit limit reached are temporary issues, while a closed bank account/credit card is permanent and will require the affiliate to obtain new payment information immediately.

SAMPLE REJECTED PAYMENT PROCESS: INSUFFICIENT FUNDS/CREDIT LIMIT EXCEEDED

1. Membership department is notified that a payment has been rejected for insufficient funds or because a member has exceeded their credit card limit.
2. The member will receive an automated email alerting them to the rejected payment and providing information regarding their options. The email should direct the member to contact the state's membership department immediately.
3. Affiliates can attempt to retry a failed EFT draft only after notifying the member that they will do so. Affiliates do not need to notify the member if they are retrying a credit card charge.
4. If the member still has not paid, membership processing staff will call the member.
5. Only if membership processing staff is unable to contact the member should the issue be escalated to UniServ staff or local leadership.
6. A monthly email may be scheduled automatically to the members who have repeatedly missed/rejected payments.
7. After all these steps have been exhausted with no resolution, notify the member that their membership will be canceled in accordance with affiliate bylaws.

Important! Do not reveal information about members' finances to staff or local leadership. Do not say that payments were rejected because of "insufficient funds" or because the member exceeded their credit line. Instead, simply refer to a generalized "payment issue." Train staff and leaders on how to address members' finances with sensitivity and professionalism.

OPTIONS FOR MAKING UP A MISSED PAYMENT

1. Schedule a one-time payment with a credit card to make up the difference.
2. Retry the EFT transaction at a later date when the member will have funds in their account and only after they have provided authorization.
3. Make a double payment on the next scheduled EFT draft.
4. Spread the missed payment out across all remaining scheduled EFT drafts.

Note: If a member elects to have their missed payment spread over the remaining draft dates, a new status sheet with new draft amounts **MUST** be sent.

Since rejections for a closed bank account or a closed or expired credit card are permanent issues, direct membership processing staff to call members immediately. Typically, affiliates will give members a shorter timeframe to provide a new bank account or credit card number than to rectify insufficient funds. New banking or credit card information should only be collected over the phone or through the eDues site, and never via text, email, or in writing. This information should be entered into the eDues site by the member or entered into IMS immediately by staff, and never written down for future entry.

When collecting dues via AutoPay, the state affiliate will know more about the status of a local's members than local leadership because dues are collected at the state level. State affiliates should set up systems to communicate membership issues to local leadership. While it is not their responsibility to collect dues, local leaders can often be helpful in engaging with members and should be kept informed on all changes to their membership.

Tactic 4: Develop clear cancellation policies

AutoPay requires clear policies dictating when members will be canceled for non-payment of dues. Developing and enforcing clear cancellation policies protects your affiliate from legal liability. Inconsistent cancellation practices could lead to some members retaining the rights and benefits of membership for longer than other members, setting up a potential Duty of Fair Representation claim.

Without a clear policy, leaders and staff will struggle to apply the rules with consistency.

Most affiliates tie cancellation to several missed payments or a length of time since the last successful payment (e.g., members are canceled after two consecutive missed payments or two months of non-payment).

Strong cancellation policies must go hand in hand with strong drop and save protocols. Often, members will not take seriously non-payment of dues until they receive their cancellation notice, and then they will want to re-join. Develop a standardized procedure for outreach to canceled members. All cancellation notices should include information on how and why to re-join.

If a legal ban on payroll deduction has been passed, determine when members who fail to convert to AutoPay will be canceled. Since canceled members can no longer convert through the eDues portal and must re-join as a new member, it is advantageous to give members a long time to convert—however, note that keeping large amounts of non-paying members on the rolls can carry serious financial implications for your affiliate.

Conclusion

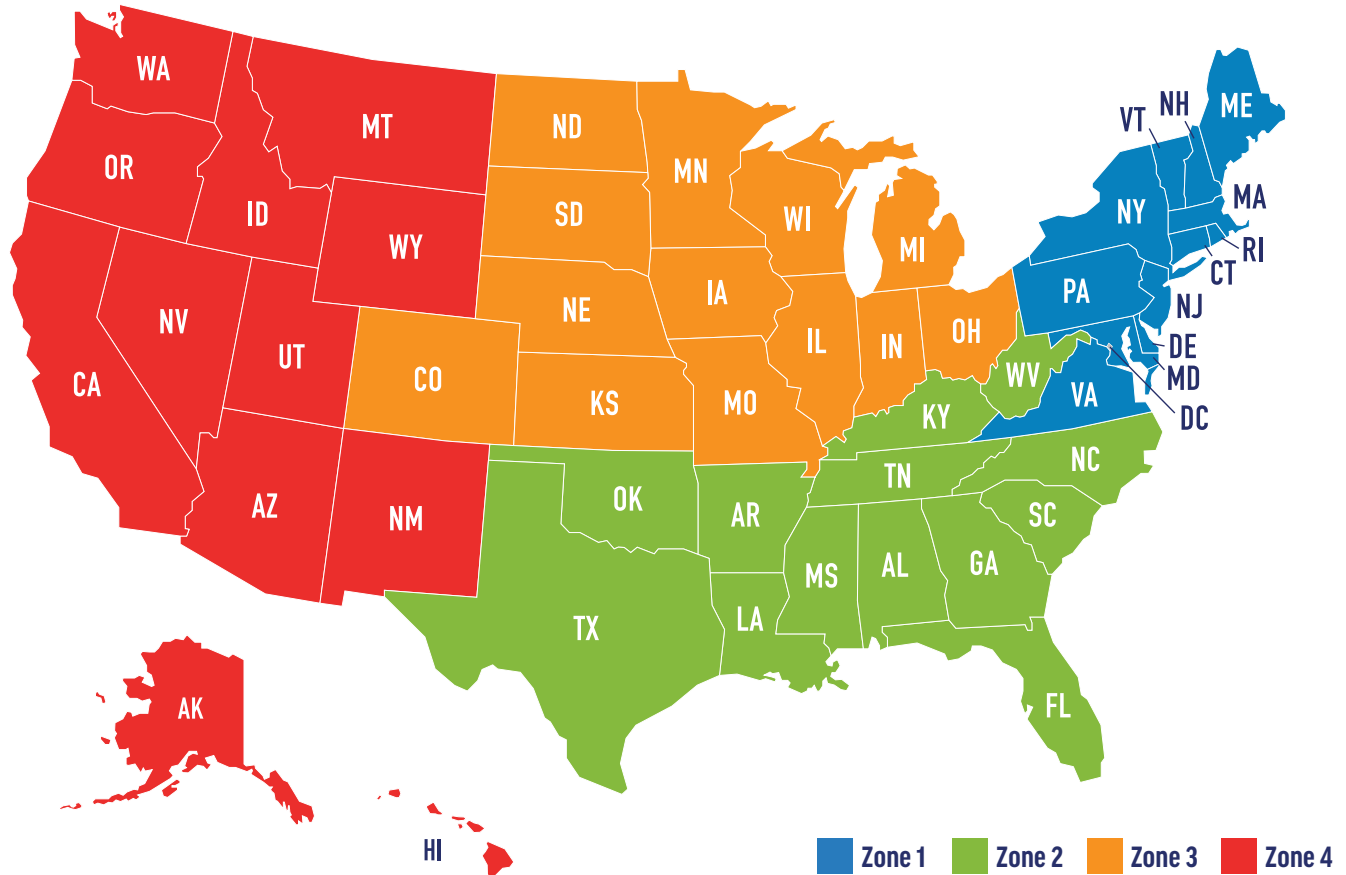
Thank you for reading the AutoPay Campaign Playbook. The Center for Organizing and Affiliate Support is always here to assist you during your AutoPay campaign. This playbook is meant to be a living document, evolving over time as we learn more about conducting successful AutoPay campaigns.

Please reach out to yro@nea.org with any suggestions or new learnings to include.



APPENDIX A: NEA Contact Sheet for AutoPay Campaigns

C4OAS Zone Directors & CBMA Specialists



ZONE 1

DAN FOREMAN
NEA360 ADOPTION SPECIALIST
✉ dforeman@nea.org

MARK SIMONS
C4OAS ZONE DIRECTOR
✉ msimons@nea.org

ANDY JEWELL
CBMA SPECIALIST
✉ ajewell@nea.org

ZONE 2

JAMIKA NEEDOM
NEA360 ADOPTION SPECIALIST
✉ jneedom@nea.org

RHONDA THOMPSON
C4OAS ZONE DIRECTOR
✉ rthompson@nea.org

DALE TEMPLETON
CBMA DIRECTOR
✉ dtempleton@nea.org

ZONE 3

DIANE MAZZOLI
NEA360 ADOPTION SPECIALIST
✉ dmazzoli@nea.org

JASON BRUNNER-BURNS
C4OAS ZONE DIRECTOR
✉ jburns@nea.org

CHARLES HOLMES
CBMA SPECIALIST
✉ cholmes@nea.org










ZONE 4

RANDY JOHNSTON
NEA360 ADOPTION SPECIALIST
✉ rjohnston@nea.org

MELISSA CASE
C4OAS ZONE DIRECTOR
✉ mcase@nea.org

BRIAN BEALLOR
CBMA SPECIALIST
✉ bbeallor@nea.org

MMS State Contacts

Contact	States Serviced
ANIL JOHN  ajohn@nea.org	Colorado, Georgia, Montana, New Mexico, Oregon, and South Dakota
BHAGYA RACHAMALLU  brachamallu@nea.org	Alaska, Connecticut, Hawaii, Mississippi, West Virginia, and Virginia
CHAITRA SUDHAKAR  csudhakar@nea.org	Delaware, Louisiana, Tennessee, UEA, Vermont, and Washington
JAN ROGERS  jrogers@nea.org	Arkansas, Idaho, Maine, Ohio, USEA, and Wyoming
KAVITA RANGARAJAN  krangarajan@nea.org	California, Kansas, Michigan, and New Hampshire
KRISHNA BOPPANA  kboppana@nea.org	Alabama, Florida, Illinois, Massachusetts, Minnesota, New Jersey, and Texas
LINDA CHAVARRIA  lchavarria@nea.org	Arizona, Federal, Kentucky, New York, and North Carolina
SOWJANYA PULIPATI  spulipati@nea.org	Iowa, Maryland, Nevada, Pennsylvania, Rhode Island, and South Carolina
TJ SHREFFLER  tshreffler@nea.org	Indiana, Missouri, Nebraska, North Dakota, Oklahoma, and Wisconsin

APPENDIX B: AutoPay Report

Source	Report	Description	NEA Tool Pathway
IMS	Membership with EFT Data Discrepancy (1)	This report lists any errors in the membership with the EFT method.	IMS Reports>Custom Data Extract
IMS	EFT/RCC Account Profile Mismatch (05)	EFT/RCC Account Profile Mismatch roster will list any inconsistencies in the data.	IMS Reports>Custom Data Extract
IMS	Members Assigned to EFT Schedule (06)	This extract will list all members enrolled to pay in EFT and the name of the schedule.	IMS Reports>Custom Data Extract
IMS	List EFT/RCC Membership that has amount (07)	This extract will list all individuals enrolled in EFT or RCC and any mismatch between obligation and scheduled amount.	IMS Reports>Custom Data Extract
IMS	EFT/RCC Deduction Count Extract (14)	This extract will provide a list of all EFT/RCC members and their number of scheduled deductions.	IMS Reports>Custom Data Extract
IMS	Members with EFT RCC account but with a different primary pay method (21)	This extract will list all members who have an EFT or RCC account profile and the Membership pay method is set to other than EFT or RCC.	IMS Reports>Custom Data Extract
IMS	List of members with a single deduction (22)	This extract will list all members who have a single EFT or RCC deduction.	IMS Reports>Custom Data Extract
IMS	EFT/RCC Enrollments (24)	This extract will list all members who were enrolled to pay using EFT or RCC through the AutoPay portal and IMS.	IMS Reports>Custom Data Extract
IMS	Rejected Payment Transactions	Allows the affiliate to list or reprocess missed dues payments.	eDues>Rejected Payments>Rejected Pymt Txns
IMS	Payment Statistics	Allows the affiliate to see and pull individual payment rejected transactions trend analysis.	eDues>Rejected Payments>Pymt Statistics
MRA	EDUES3200 - eDues Enrollment Pay Method Change Tracking	eDues Enrollment Pay Method Change Tracking report allows reporting on eDues enrollment changes.	Team Content>Membership>Membership Portal Reports>Standard Reports>eDues
MRA	EDUES2200 - eDues Pay Method and Account Information Comparison	Reports: <ul style="list-style-type: none"> • Members with Account Profile & Payment Profile • Members with Account Profile & Missing Payment Profile • Members with Payment Profile & Missing Account Profile • Members with Both Account & Payment Profiles Missing 	Team Content>Membership>Membership Portal Reports>Standard Reports>eDues
MRA	INDP0400 - Individual Payment Rejected Transactions	This report generates rejected individual payment transactions and can be sorted by UniServ/Local.	Team Content>Membership>Membership Portal Reports>Standard Reports>Individual Reports
MRA	INDP0304 - EFT Prenote Transaction Analysis	This report displays the EFT prenote transaction status after scheduling the prenote first. States will need to contact NEA to schedule the prenote for this report to generate information.	Team Content>Membership>Membership Portal Reports>Standard Reports>Individual Reports
MRA	INDP1020 - EFT Bank Account and Routing Number Monitoring Report	This report displays individuals that are using the same accounts for dues payments for EFT only.	Team Content>Membership>Membership Portal Reports>Standard Reports>Individual Reports

(Continued on next page)

AutoPay Report *(continued)*

Source	Report	Description	NEA Tool Pathway
MRA	INDP1081 - State Affiliates Deduction Schedule by Pay Method	List state/local affiliate deduction scheduled by the eDues pay methods.	Team Content>Membership>Membership Portal Reports>Standard Reports>Individual Reports
MRA	INDP2000 - Individual Payments YTD Transactions	List individuals based on YTD receipts by different pay methods and locals. This report can be run as an extract to include mailing and email information.	Team Content>Membership>Membership Portal Reports>Standard Reports>Individual Reports
MRA	INDP1010 - Individual Payments Distribution Summary by Funds for Projected and Successful Transactions	This report displays the fund information by payment date. This report is ideal for sharing with locals to report the disbursements determined by the successful receipts.	Team Content>Membership>Membership Portal Reports>Standard Reports>Individual Reports
MRA	INDP1012 - Individual Payments Distribution Details by Funds for Projected and Successful Transactions	This report displays the receipts by individual and fund group by payment date. This report is ideal for sharing with locals to report the disbursements determined by the successful receipts.	Team Content>Membership>Membership Portal Reports>Standard Reports>Individual Reports
MRA	INDP0402 - Individual Payment Rejected Transactions Trend Analysis	This report displays individual payment rejected transactions trend analysis. The report allows the user to select individuals in the highlighted analysis to determine the rejected reasons.	Team Content>Membership>Membership Portal Reports>Standard Reports>Individual Reports
MRA	FRAR0150 - Accounts Receivable Summary - Percentage Paid	This report displays the percentage of dues collected for the membership year.	Team Content>Membership>Membership Portal Reports>Standard Reports>Funds Receivable
MRA	FRTR0800 - Daily Transaction Report	This report displays receipts posted to FRS. The report is ideal to find rejected transactions for bank reconciliations as well.	Team Content>Membership>Membership Portal Reports>Standard Reports>Funds Receivable

APPENDIX C: Payroll Deduction Model Provisions and Bargaining Guidance

Guidance and Model Language

Collective Bargaining and Member Advocacy Department • August 2023

Introduction: Since 2010, 13 states have enacted laws prohibiting payroll deduction (PRD) of union dues as politicians who are hostile toward collective bargaining continue to look for ways to attempt to weaken unions. This document was developed to provide model language for affiliates to help preserve the ability to collect union dues. As state laws differ on this topic, local affiliates should seek counsel from their state association before implementing or proposing any of the language provided in this document.

Dues Authorization

The employer should not be involved in the process by which individual members join or leave the union. Likewise, an employee's authorization or cancelation of the withholding of association dues is an internal union issue that should not be a part of a collective bargaining agreement (CBA) or otherwise involve the employer. The employer's responsibility in this matter should be expressly limited to honoring the terms of an employee's payroll deduction authorization by deducting dues in amounts designated by the union from employees identified by the union and promptly transmitting dues dollars to the local or state association. The language of the CBA should be limited to describing the employer's responsibilities in this regard and, if necessary, insulating the employer from legal liability.

NEA's Office of the General Counsel developed a **Toolkit on Membership Agreements** that is the one-stop shop for information about our membership agreements. It addresses dues authorization agreements, maintenance of dues, and the need to stay away from anything resembling maintenance of membership. It includes model membership language, as well as a section strongly recommending against including membership terms in CBAs.

Payroll Deduction in the Collectively Bargained Agreement

The payroll deduction of union dues, which requires minimal costs to administer, is a common provision found in CBAs. Having such a provision can temporarily shield (during the term of the agreement) a union from legislation banning PRD, giving it time to implement an alternate system, such as electronic funds transfer (EFT), for collecting union dues. As previously stated, bargaining language should be limited to the responsibilities and indemnification of the employer. **Here is model PRD language:**

The Employer agrees to honor the terms of an employee's written, voluntary authorization to have Association dues, fees, and political contributions deducted from their wages. The employee shall authorize deductions using a form created and maintained by the Association and signed by the employee in any manner that satisfies the [State] Uniform Electronic Transactions Act.

Each month, the Association will provide the Employer with a list of the names of employees who have signed a payroll deduction authorization and the amount that is to be deducted each pay period. The Employer shall transmit those deducted amounts to the [local or state] Association [describe timing/schedule]. The Association will provide the Employer with an employee's authorization form, or proof of such authorization if signed electronically, only if there is a dispute about the existence or terms of the authorization.

The Employer will cease deductions from an employee's wages upon the Association's request. If an employee notifies the Employer that they wish to revoke their payroll deduction authorization, the Employer will refer the employee to the Association. Upon an employee's resignation or retirement, the Employer will notify the Association and cease payroll deductions.

PRD provisions often contain an indemnification clause whereby the union agrees to indemnify the employer if disputes arise over the employer's action in complying with a PRD provision. **If an employer insists on an indemnification clause, we suggest that the local propose the following model language:**

In the event that a current or former member of the [local] Association brings legal action in a court or administrative agency because of its compliance with this provision, the [local] Association agrees to defend such action, at its own expense, using its own counsel, provided that Employer gives immediate notice of such action in writing to the [local] Association, permits the [local] Association to intervene as a party, and gives full and complete cooperation to the [local] Association throughout the legal proceeding, including any appeal. The [local] Association has the right to control litigation strategies and decisions and determine whether any action or proceeding referred to above shall or shall not be compromised, defended, tried, or appealed. This provision will not apply to any legal action that results from the Employer's negligence or willful misconduct.

APPENDIX D: Negotiating Strong PRD Provisions

(SEPTEMBER 2023)

Since 2010, a number of state legislatures have enacted laws that bar or severely restrict public employers from deducting union dues from employees' wages, including Wisconsin in 2011, Michigan in 2012, Iowa in 2017, and Indiana and West Virginia in 2021. The dam burst open, however, in 2023, when four states—Arkansas, Florida, Kentucky, and Tennessee—enacted payroll deduction prohibitions.

Many critical lessons were learned from efforts to challenge these laws and convert members in those states from payroll deduction (PRD) to AutoPay options (i.e., recurring electronic funds transfers from members' bank accounts and recurring credit/debit card charges).

We know that we cannot rely on the courts to end these legislative threats. Although trial courts in Kentucky and Indiana have enjoined laws prohibiting and restricting PRD (both cases are now pending on appeal), litigation efforts in other states have been unsuccessful. And even if a court strikes down a PRD prohibition, that does not preclude a state legislature from enacting a more carefully drafted bill that takes into account the court's ruling. Accordingly, while a litigation strategy should be considered, and possibly employed to gain additional time to convert members to different payment options, as discussed below, it cannot be relied on to protect PRD moving forward.

Our best hope of minimizing the membership losses from these prohibitions is to ensure that we have strong worksite organizational structures in place and adequate time to execute conversion campaigns. Although the issue of building strong structures is vital, it is beyond the scope of this memo. Instead, we will address the issue of maximizing the time we have to convert members, which can be accomplished by collectively bargaining strong payroll deduction provisions that create a contractual right that will remain in effect through the contract's duration even if the legislature enacts a statutory prohibition in the meantime.

In states that have bargaining rights, where it remains lawful to collect dues through payroll deduction and there is even a remote threat that the legislature could prohibit payroll deduction in the future, we recommend that our state affiliates work with their locals to prioritize bargaining strong provisions that remain in effect for as long into the future as possible.

In prioritizing this work, we recommend focusing first on our largest and most dense locals that have not yet bargained strong payroll deduction provisions before turning to smaller locals and locals that have existing provisions which could be improved.

When it comes to bargaining PRD provisions, locals fit within several categories, which we list in the order they will be discussed below:

1. Locals that have not bargained PRD provisions in their CBAs
2. Locals that have not bargained CBAs
3. Locals that have bargained PRD provisions that could be improved
4. Locals that have previously bargained strong PRD provisions

1. We recommend that state affiliates identify locals in the first category and encourage them to prioritize bargaining strong PRD protections. Locals that have secured a CBA, either through mandatory or permissive bargaining, may be in the best position to create a contractual right to PRD where none previously existed. Locals with CBAs that are set to expire soon can propose a PRD provision when they negotiate a successor CBA. And locals with CBAs that will not expire soon can decide whether to request mid-term bargaining over a PRD provision if there is an immediate legislative threat. Locals can encourage employers to bargain in order to avoid the disruptive effect that a newly enacted PRD prohibition can have on the employer's payroll staff, which often occurs at or near the end of the school year. NEA's model PRD provision, discussed in guidance issued recently by NEA's Collective Bargaining and Member Advocacy Department, is set forth below as Attachment A. Even where payroll deduction of dues has been established by state law, if there is even a remote threat that the legislature could prohibit PRD in the future, we strongly recommend that locals incorporate PRD language into their contracts.

2. We recommend that state affiliates work with locals that have not negotiated a CBA to explore whether those locals may find success negotiating at least a stand-alone agreement providing a contractual right to the payroll deduction of dues. This will primarily occur in states with only permissive bargaining. Although an employer may be unwilling to engage in permissive bargaining over general terms and conditions of employment, it may nevertheless be willing to enter into single-issue bargaining that merely seeks to maintain the status quo with respect to PRD. As mentioned above, doing so may ultimately benefit the employer, which may want to avoid the disruption created by state laws that end payroll deduction with little notice. To facilitate these discussions, NEA has prepared a sample cover letter and single-issue agreement, which is set forth below as Attachment B. The goal should be to get as long a term as possible on such a stand-alone PRD agreement.

3. For locals that have bargained PRD provisions that could be improved, we recommend that state affiliates help identify how those provisions can be improved, using NEA's model PRD provision (Attachment A) as guidance. The local, during regular or mid-term bargaining, can then propose improvements to the existing agreement. Moreover, the local should seek to bargain a duration clause that leaves the PRD provision in effect for as long as the employer agrees. NEA is aware of locals in permissive-bargaining states successfully negotiating PRD provisions that remain in effect for 5 years or longer even when the rest of the CBA is set to expire in 1 or 2 years.

4. Finally, even when a local has bargained a strong PRD provision, if there is any legislative threat on the horizon, it is worth exploring whether the local could successfully negotiate a lengthy duration clause as discussed above.

For more information, contact Dale Templeton, NEA Director of Collective Bargaining & Member Advocacy: dtempleton@nea.org

ATTACHMENT A

NEA MODEL PAYROLL DEDUCTION PROVISION (SEPTEMBER 2023)

Model PRD Provision

The Employer agrees to honor the terms of an employee's written, voluntary authorization to have Association dues, fees, and political contributions deducted from their wages. The employee shall authorize deductions using a form created and maintained by the Association and signed by the employee in any manner that satisfies the [State] Uniform Electronic Transactions Act.

Each month, the Association will provide the Employer with a list of the names of employees who have signed a payroll deduction authorization and the amount that is to be deducted each pay period. The Employer shall transmit those deducted amounts to the [local or state] Association [describe timing/schedule]. The Association will provide the Employer with an employee's authorization form, or proof of such authorization if signed electronically, only if there is a dispute about the existence or terms of the authorization.

The Employer will cease deductions from an employee's wages upon the Association's request. If an employee notifies the Employer that they wish to revoke their payroll deduction authorization, the Employer will refer the employee to the Association. Upon an employee's resignation or retirement, the Employer will notify the Association and cease payroll deductions.

Model Indemnification Clause – if an employer insists on including indemnification language, we recommend the following:

In the event that a current or former member of the [local] Association brings legal action in a court or administrative agency because of its compliance with this provision, the [local] Association agrees to defend such action, at its own expense, using its own counsel, provided that Employer gives immediate notice of such action in writing to the [local] Association, permits the [local] Association to intervene as a party, and gives full and complete cooperation to the [local] Association throughout the legal proceeding, including any appeal. The [local] Association has the right to control litigation strategies and decisions and determine whether any action or proceeding referred to above shall or shall not be compromised, defended, tried, or appealed. This provision will not apply to any legal action that results from the Employer's negligence or willful misconduct.

ATTACHMENT B

REPRESENTATIVE CORRESPONDENCE

[LETTERHEAD]

[DATE]

RE:

Dear Superintendent:

We are writing as the representative of the district's [bargaining unit description]. We are asking to [bargain/meet and confer] with the district to ensure that employees may continue paying their association dues by authorizing the district to withhold those dues from their wages and transmit them to the association. Permitting employees to authorize such withholdings is a long-held benefit of employment that ensures that employees retain access to association services and benefits. Specifically, we propose entering into a [contract/memorandum of understanding] that protects the right of the district to extend this right to employees.

We have attached a draft for your review. We would like to find a mutually agreeable time when we can meet to discuss this further. Please contact me at your convenience.

Sincerely,

ATTACHMENT C

AGREEMENT BETWEEN THE [LOCAL ASSOCIATION] AND THE [EMPLOYER]

Payroll Deduction of Association Dues

This Agreement is made and entered into on this ____, __, 2023, by and between the [EMPLOYER] (hereinafter "___"), and the [LOCAL ASSOCIATION] (hereinafter "Association") as the representative of [describe unit].

1. The Employer agrees to honor the terms of an employee's written, voluntary authorization to have Association dues, fees, and political contributions deducted from their wages. The employee shall authorize deductions using a form created and maintained by the Association and signed by the employee in any manner that satisfies the [State] Uniform Electronic Transactions Act.
2. Each month, the Association will provide the Employer with a list of the names of employees who have signed a payroll deduction authorization and the amount that is to be deducted each pay period. The Employer shall transmit those deducted amounts to the [local or state] Association [describe timing/schedule]. The Association will provide the Employer with an employee's authorization form, or proof of such authorization if signed electronically, only if there is a dispute about the existence or terms of the authorization.
3. The Employer will cease deductions from an employee's wages upon the Association's request. If an employee notifies the Employer that they wish to revoke their payroll deduction authorization, the Employer will refer the employee to the Association. Upon an employee's resignation or retirement, the Employer will notify the Association and cease payroll deductions.

This Agreement shall remain in full force and effect until June 30, 2028.

For [ASSOCIATION]

For [EMPLOYER]

(NAME) For [ASSOCIATION]

(NAME) For [ASSOCIATION]

APPENDIX E: Telephonic Conversion Supports

Using Telephonic Organizing to Develop a Comprehensive Campaign

As you make the transition from payroll dues deduction to AutoPay, NEA's experienced tele-organizers are prepared to support affiliates throughout all stages of your conversion campaign—before, during, and after. While telephonic organizing cannot replace the importance of one-on-one worksite conversations, it can provide a crucial surround sound to help facilitate your shift to AutoPay.

NEA recommends that affiliates use the following research-based steps to ensure a successful conversion campaign.

Prior to Your Campaign: Preparing for Conversion Success

To succeed in an AutoPay campaign, prioritize establishing robust communication systems for effective member outreach. **Consider:**

- ▶ If your membership contact data is inaccurate, **tele-organizers can update that data**. We will call through your list and help clean out bad information.
- ▶ If you need new and innovative ways to identify leaders and activists, **tele-organizers can generate hot leads for you to recruit and train into activism**.
- ▶ If you need to alert your members to an upcoming threat of payroll deduction loss, **tele-organizers can relay that message to thousands of members in one night** and prepare them for upcoming asks to convert their dues.

Empowering Success: The AutoPay Conversion Campaign

About 31% of members need up to four one-on-one conversations for a smooth AutoPay transition. Enhance your conversations with NEA tele-organizers for extended outreach at a fraction of the cost.

NEA's Telephonic AutoPay Conversion process is streamlined and straightforward to establish.

- ▶ **Direct Approach:** Our tele-organizers adhere to a stringent protocol to secure enforceable voice authorizations, safely gather members' financial information, and enter it into NEA AutoPay.
- ▶ **SMS Outreach:** Tele-organizers send members an AutoPay link via text, guiding them to execute the conversion on their personal mobile devices.

Continuing the Journey: Post-Campaign Cleanup, Support, & New Member Organizing

The conclusion of any conversion campaign does not mark the end. Successfully managing this transition demands ongoing and time-intensive follow-up work, underlining the necessity for robust workflow processes to sustain affiliate density levels. **Affiliates must establish systems to address the following:**

- ▶ Notify members facing credit card/ACH issues
- ▶ Educate members about the importance of membership as the conversion date nears
- ▶ Deliver final notifications on membership cancellations and union protection loss
- ▶ Identify and train leaders for AutoPay campaigns and new member organizing

Cost and Timeline: This service is currently free for state affiliates transitioning from payroll deduction. Affiliates would need to collaborate with NEA Center for Organizing and the Office of the General Counsel for script creation, list compilation, and campaign target identification. Field calls can begin in just two weeks.

For more details or to initiate the telephonic organizing process, contact us at yro@nea.org

APPENDIX F:

Iowa SEA Rejected Payment Processes

EFT (Electronic Funds Transfer)

ACCOUNT CLOSED, PAYMENT STOPPED, OR INCORRECT ACCOUNT

August:

Membership department will email a list of all members who we need updated account information.

October/November:

Membership department will email a list of all members that have no deduction gone through yet and need updated account information after each EFT deduction date.

UniServ associate staff steps:

1. Email the members to let them know we need updated information using an email merge that includes the member ID, last four of the account number, their contact info and a link to the EFT website.
2. After 3-5 days, email again to ask for information.
3. If nothing heard back, then text/call the member.
4. Contact local leaders for assistance.
5. UniServ director to do personal follow up with members.

If a payment was missed, the members have the following options:

- Have the missed amount resubmitted for payment.
- Make a one-time payment by Credit Card or EFT for the missed amount.
- Spread out over the remaining payments.

Email isea.membership@isea.org to let the membership department know which option the member chooses. Include in the email the member's name and member ID. UniServ associate staff should also add any information and copies of emails from members and staff to the notes tab of the member's profile in IMS. Do not put any account numbers in the notes tab.

If a member has no successful payments for 2 deduction cycles for monthly deductions and 4 deduction cycles for bi-monthly deductions, then the membership department will cancel the membership. The membership department will send a cancellation letter and email and notify the UniServ staff.

For members that had 1 or more successful deduction but now has an account problem, closed account, or payment stopped, the members will have the same options as above. The following steps will be followed:

1. The membership department will email the member.
2. If no response after 3 business days, the membership department will call the member. The member will be notified of when they need to respond before the next missed payment. Voice messages will be left.
3. If no response after 1 business day, the Membership Department will email the appropriate UniServ staff of the members that are not responding and put the email in the notes tab of the member's profile in IMS.
4. UniServ staff should reach out to the member via email, call, text, or asking local leaders for assistance. Information about the contact to the member should be included in the notes tab of the member's profile in IMS. Do not put any account numbers in the notes tab.
5. If the member's information has not been successfully updated after 7 days, the membership department will cancel the membership and notify the member by letter and email, and the staff by email.

INSUFFICIENT FUNDS

After a rejection for insufficient funds, the membership department will email the member letting them know their payment was rejected. The email will inform the member that we will try to reprocess the payment 2-3 business days after sending the email (the specific date will be included in the email).

If the payment is rejected a second time, we will contact the member by phone to discuss options for paying the missed payment. If they do not answer, we will leave a message with a date of 3 business days to get back to us. If the member does not respond by that date, we will notify the UniServ staff of the members that are not responding.

UniServ staff should reach out to the member via email, call, text, or asking local leaders for assistance without letting them know it is for insufficient funds. UniServ directors should be involved in contacting the member as well. Information about the contact to the member should be included in the notes tab of the member's profile in IMS.

The member should be given the following options:

- Attempt payment a third time with approval from the member.
- Make a one-time payment by Credit Card for the missed amount.
- Offer to spread out over the remaining payments. Will need to get approval in writing from the member (an email from the member is fine) and will need to send an updated status sheet with the new amount.

UniServ staff should email isea.membership@isea.org to let the membership department know which option the member chooses. Include in the email the member's name and member ID. If the member does not respond, a payment will be run at the next regular EFT deduction date for that member.

If the next regular EFT deduction is missed due to insufficient funds, the membership department will include this on the next EFT reject list that is sent to staff. The membership department will again work to collect that payment by reprocessing the payment as above.

If the reprocessed payment is rejected as well, we will notify the member that they have 5 business days to contact us otherwise their membership will be canceled. If we are not able to successfully collect payment for either payment (do not have to be consecutive anymore) the membership will be canceled, and we will notify the member by letter and the staff by email.

**Note: if a member has one unsuccessful payment during the year that we are unable to collect on but has no other issues the rest of the year, the membership department will adjust the State dues accordingly and allow the member to continue.*

CREDIT CARD

Expired Credit Cards:

The first week of August, the membership department will email UniServ staff a list of all active members who have credit cards that are expired or will be expired before October 15. UniServ staff should reach out to the member via email, call, or text. UniServ directors should be involved in contacting the member as well. Information about the contact to the member should be included in the notes tab of the member's profile in IMS. UniServ staff should attempt to get this information updated prior to October 1.

Retired and miscellaneous members who have expired credit cards will be contacted directly by the membership department.

General Rejection/Credit Limit Reached

The membership department will contact these members directly. If any UniServ staff assistance is needed, the membership department will reach out to staff directly.

APPENDIX G: Questions and Ah-Ha's from Three Executive Directors

By: Terrance Gibson, Tennessee Education Association, Mary Ruble, Kentucky Education Association, & Yvette Stennett, Florida Education Association

Campaign Strategy

BUILD A STATEWIDE & DISTRIBUTIVE CONVERSION TEAM

- ▶ Put together a team to build a statewide conversion plan that can be put into action before being forced by law. **This should include:**
 - A task-oriented point person to lead the team who knows how to run successful campaigns (preferably a Membership Manager)
 - A point person who can direct shared staffing efforts when visiting staff come to help
- ▶ You must have a distributive leadership structure to manage the utterly massive number of tasks and deliverables. **Assign specific tasks with specific deadlines to specific individuals.** Hold regular check-ins to keep everyone accountable to the goals of the campaign.
- ▶ Division of labor is important and includes data tracking of the campaign's progress, managing changes and maintaining focus, collaborating with staff and local leaders, training organizers and site reps, technical training for using the tools, brainstorming new tactics, processing any finance needs.
- ▶ Strategic and tactical planning at all levels of the organization prepares everyone for the expectations and builds buy-in to a successful campaign.
- ▶ As you go through the process, experts in locals will rise to the forefront; engage with them and ask them to help others who may be struggling. (If possible, offer some form of compensation for engaging in significant extra workload.)

CONVERSION CAMPAIGN STRATEGY

- ▶ **This is a straightforward organizing campaign—all of our core organizing principles apply to this effort.** One-on-one organizing principles apply. AHUY principles apply. Preparing as many people as possible to organize is critical and mathematically necessary to tackle the scale of the challenge. Communications and tracking technology are necessary and must be functional and usable, but should be viewed as tools to amplify the work of the people engaged in the campaign, not the means by which the campaign succeeds.
- ▶ **You cannot start too early.** Plan ahead. Put the necessary tools in place for dues conversion even if you don't plan to use them immediately. Test your tools and conversion campaign structure on a willing local, preferably one with released leadership and strong building reps.
- ▶ Begin the conversion campaign by having officers, then executive boards, and then site reps complete the process. Then move on to the membership. The leadership will then be in a better place to work with members.
- ▶ You can expect a maximum of about 7–10% of members to convert using mass communications. All of the others will require a person to engage with them one-on-one to complete the process.
- ▶ **Worksite Visits:** When blitzing sites, preparatory communications matter. Emails, calls, Hustles, worksite meetings, and site reps making calendared appointments for conversion meetings all lead to greater penetration and success.
- ▶ Capitalize on every possible mobilization event by tying it to the campaign. Remind local leaders regularly to seize these opportunities.
- ▶ Identify retirees and other individuals who can be Member Organizers and boots-on-the-ground volunteers.
- ▶ Create MOUs for Member Organizers/volunteers that outline what the stipends will be and what you are asking them to do.
- ▶ Have weekly virtual conversion updates to celebrate wins, share learnings, discuss missteps, and uplift efforts. Creating a space where people can share problems and solutions and others can review and learn is helpful. Microsoft Teams is useful as a repository and collaboration tool.
- ▶ **Make sure you have enough appropriate technology** for organizers and staff to use, especially in rural areas with poor internet connectivity.

CONVERSION CAMPAIGN STRATEGY (CONTINUED)

- ▶ **Create an electronic communication strategy** (i.e., Hustle, robocalls, postcards, radio ads, weekly emails, etc.) to go along with your building-to-building canvassing efforts.



- *Think past the initial conversion push. What will it look like to sign up new members on eDues? When will you move from conversion to recruitment, and how?*
- *Can you try a voluntary conversion campaign in locals with good infrastructure?*

WORKSITE STRUCTURES ARE KEY TO SUCCESS

- ▶ **Engage and assess your site rep structure leading up to the campaign.** Identify where we have weaknesses to rehabilitate or work around. For state organizations, it is best to power map locals as well and be prepared to focus work on struggling locals.
- ▶ Site reps that over-communicated and engaged in a concerted campaign, including mapping and assessing members, moved the campaign more successfully.
- ▶ Conversion efforts run more smoothly in buildings that have active and engaged association/building reps.

ENGAGING & INCENTIVIZING LOCALS

- ▶ Any funding provided to locals should be contingent upon the local's development and commitment to an organizing plan; continued funding should be contingent upon the execution of the plan.
- ▶ Know your high-density targeted locals and inform your board about the business aspects of the numbers game (i.e., large locals bring in more dues revenue).
- ▶ Think deeply about what the conversion work will look like in smaller locals with weak/non-existent governance/building reps. This is the harder work.
- ▶ Create a voluntary conversion program with incentives for the local affiliate, individual members, and/or local leadership.
- ▶ **Create a tiered incentive program for:**
 - Association/building reps who convert various percentages of their buildings
 - Local presidents whose locals convert at varying percentage levels
- ▶ Create a recognition program or competition for equitably-sized locals that can be highlighted at your delegate assembly.

MESSAGING

- ▶ Training leaders is paramount to protecting educators' voices, social justice, and the institution of public education.
- ▶ Public-facing messaging must let our members know the threat is real without letting the opposition think they have won or that we are running scared.
- ▶ Staff and local leaders must be able to succinctly articulate why a member should stay with our association and convert to eDues. Without that understanding, most members will not convert.

MESSAGING (CONTINUED)

- ▶ **You cannot over-communicate.** Ahead of the campaign, provide members with as much information as possible. Because this change involves members' financial information, be prepared to reassure them by providing all of the details.
- ▶ Engage in every type of communication at your disposal; but remember that training and empowering site reps is the most important method. Urge locals to make use of all tools available to them, and assist them whenever welcome and possible.
- ▶ Hold regular Zoom meetings where locals can raise questions, discuss issues, and share solutions statewide.
- ▶ Making campaign materials simple to read with smart graphical flow helps—but remember to have the details available.

LISTS & DATA

- ▶ Months in advance, we began a campaign to significantly improve our communications data for each member. We used programs to identify bad emails and aggressively sought better information. Cell phone numbers are critical to using all our available communication tools. **Site reps were the key to successful data-gathering efforts.**



- *Do you have a current list of your locals from largest to smallest?*
- *How accurate is your member contact data, and how often do you confirm its accuracy?*

LEGAL STRATEGIES



- *Is payroll deduction outlined/protected in state law or a state policy?*

- ▶ Have your legal team work on court strategies without betting that the battle in the courts will be favorable to us.
 - Think carefully about this: litigation will take time and may or may not be successful. Even if you are able to get a temporary or permanent injunction, that probably won't stop the legislature from trying to amend the legislation during their next session.



- *Also, consider the impact of judicially regaining payroll deduction after spending months or years converting members to eDues while awaiting the legal outcome; do you want to waste all that work? Do you want your affiliate's existence to remain vulnerable to legislative whims?*

ENGAGING NEA

- ▶ Work with your Zone Director to request shared staffing through NEA.
- ▶ **NEA can and will help.** Reach out. Be specific about what you need and when you need it.

YOUR BUDGET

- ▶ Consider the statistics; most state affiliates that are forced into dues conversion lose about 30% of their members after a year. Plan for the impact of that significant loss of revenue. Think about short- and long-term liabilities, member programs, governance structures, staffing levels, building obligations, overall association capacity, etc.
- ▶ Build the increased banking fees from credit card processing into the budget.
- ▶ Get your budget committee/CFO to analyze what your budget would be if you lost 20%-30% of your income. Discuss what programs and how many staff positions would be cut if such a loss occurs.



- *How long could your operations survive if payroll dues deduction ceased as an option?*
- *Decide what programs, activities, or association events should be canceled or delayed during the crisis. Be realistic: What must you continue doing? What should you continue doing, and what adjustments must be made? What should you stop doing entirely?*

DUES COLLECTION & BANKING

- ▶ Design a plan to absorb the new/unanticipated work of tracking down insufficient fund payers and credit cards that expire.
- ▶ **Set a hard deadline of November 30th to drop all those who have yet to convert.** Members can only use the eDues portal if their record is "active" in NEA360/IMS. Using the eDues portal is quick, easy, and much preferable to signing them up as new members.
- ▶ Keep close track of the number of members who have not converted, and work with NEA Finance to support your timely request to have the uncollectible dues written off. Keeping members who have not converted in NEA360 as "active" means your member numbers will be overstated and the affiliate will continue to be liable for the portion of NEA dues from members who are being counted but are not actually paying dues.
- ▶ Make sure every local has every payroll schedule collected and ready to implement as an eDues schedule if you are trying to align the deduction with pay dates. We did this to minimize occurrences of Insufficient Funds fees for our members.
- ▶ If you are using your own eDues processing system or working directly with a bank, be aware of reclaimed funds that can be taken back for up to 60 days after a draft succeeds. **This can be because of stop payments and other scenarios like:**
 - R05 – Unauthorized Debit to Consumer Account Using Corporate SEC Code
 - R07 – Authorization Revoked by Customer
 - R10 – Customer Advises Originator is Not Known to Receiver and/or Originator is Not Authorized by Receiver to Debit Receiver's Account
 - R11 – Customer Advises Entry Not in Accordance with the Terms of the Authorization
- ▶ **Train staff as dedicated resources for an eDues issue help desk (both phone-based and email-based):**
 - Cross-train both functional and technical staff to help
 - Dedicate shared mailboxes for eDues support
 - Dedicate a phone hotline
 - Consider using a chat agent/bot (we did not do this, but it would have been helpful if we had the resources to)

DUES COLLECTION & BANKING (CONTINUED)



- *How many members do you currently have on eDues, and who monitors the process and collection of eDues?*
- *What are your relationships with financial institutions that could serve as your dues repository?*
- *Does your affiliate collect dues centrally (all dues go to the state affiliate and then back out to locals) or does each local collect and remit to the state affiliate?*
- *Do you want to allow the use of credit cards for dues payments? (Higher fees for each transaction but some members like the option to get rewards.)*
- *Does your affiliate have a sub-account with Bank of America? (NEA has an enterprise agreement with them for dues collection, but each affiliate must establish a separate sub-account.)*
- *If you aren't using eDues, how will you collect individual member financial data, and how will you keep it secure?*

IMS, NEA360, & JOIN NOW



- *Are you on the Join Now platform? If you aren't on Join Now, how will you sign up new members, collect their financial data, and keep it secure?*
- *Do you use NEA360/IMS to maintain your membership data?*
- *If you use NEA360/IMS for membership data, have you considered your custom settings in eDues (affiliate branding, payroll schedule options and programming, local dues amounts, credit card options, etc.)?*

Leadership

GOVERNANCE ENGAGEMENT & POLICIES

- ▶ Understand the internal concerns of moving from payroll deduction to eDues.
- ▶ Develop policies and procedures at the state and local levels to deal with how eDues work. Some areas may not have been needed in the past—for example:
 - How many failures to draft union dues before a member is placed in bad standing (i.e., canceled or dropped as a member)? Is this automatic?
- ▶ Do a board presentation on the looming threat and potential organizational impact. Plan for and address any internal barriers (constitutional, bylaw, policy) that restrict dues collection methods or processes.



- *Do your governing documents speak to the issue? What changes may need to be addressed in the documents?*

STAFF MANAGEMENT



- *Does your membership staff have a strong understanding of NEA360?*
- *Are your staff seniority lists accurate?*
- *Do your staff contracts have language on layoffs/RIFs?*

LEADING DURING CRISIS

- ▶ Change is hard. Change in crisis is harder.
- ▶ Do not panic. Be deliberate. Focus your fully-staffed conversion efforts on your largest locals to move the most members as quickly as possible.
- ▶ **Consider morale.** Expect and plan for anxiety among staff (and their significant others):
 - Find ways to keep morale up, especially for those at the bottom of the seniority list
 - Share positive messages from the president and executive director: “We will grow through this attack”
 - Have a staff meeting to discuss the Storming, Forming, Norming, and the unanticipated that will occur during the conversion process
 - Assure members that we are fighting for the legacy of the organization
- ▶ Membership is everybody’s business!
 - It is imperative that ALL staff be engaged in the conversion effort—make it part of your weekly/daily updates and briefings.



- *Do you expect your building staff and managers to be in the field/buildings at least two days a week, more, etc.?*
- *How and how often will your board reach out to local officers to motivate them on the urgency of the conversion campaign?*

LEADING DURING CRISIS (CONTINUED)

- ▶ Leaders must take time to check in on the wellness of those helping move the campaign and each other. The stress level is significant and takes a toll.
- ▶ It is critical to build a mindset that leaders and staff do not say “no” to others. We must give every idea an opportunity in this moment.
- ▶ **Publicly celebrate successes, no matter how small: they motivate.** Our field team begins each and every meeting with an opportunity for everyone to share wins.
- ▶ Mentally prepare everyone for plateaus in your campaign. Prepare strategies and tactical changes to rebuild momentum.
- ▶ Everyone needs to be prepared to give each other some grace—the massive changes will be difficult to navigate cheerfully. Regularly remind everyone of this.
- ▶ **All hands on deck. Communicate with staff often. Additional staff WILL BE NEEDED.** Job assignments will change dynamically when dealing with the implementation of Dues, especially in an emergency scenario.
- ▶ Leadership must actively communicate the top-down decisions and directions of the state affiliate.
- ▶ Organize around a core mission and set goals as a state organization. It’s impossible to take every local’s desires into account—clearly communicate a firm direction.

