**Check Lists**

**Email Blast Check List**

* **Identify your target audience**
* Full local?
* Group of workers?
* Leaders?
* Nonmembers vs members?
* **Set your goals**
* How does this relate to the membership, RRT and platform goals you set for your region?
* Does this email blast invite people to something or to be part of something?
* Is this an update email?
* **Use this** **form email for events**
* **Use this** **form email to recruit members to join the RRT and sign onto the platform**
* **Send out the email using BCC**
* **Keep an eye on responses for the next few days.**

Things to consider:

* + Talk through making small to big asks. The importance of asking everyone to do a small thing builds commitment, leadership and takes things off people’s plates.

**Worksite visit Checklist**

* **Identify team members; who is helping you for this event?**
* Do you know a member or leader who you can talk to about this event? Ask them to take you on rounds introducing yourself! Can they reserve a conference room or notify the office manager we will be using the break room?
* **Do some research**
* How many members/nonmembers are at this site?
* How many of them actually work there? Is there a day the office is more busy than usual?
* Is this a building with multiple worksites?
* Is there a specific topic you want to call these meeting on?
* **Set a date, time, and a goal**
* Plan for 2 hours depending on the size
* Do you want to talk to people one-on-one or talk to a group?
* If your goal is to talk to a lot of people, we recommend doing rounds before an open house style event like a coffee klatch. You can introduce yourself, have a more one on one conversation, and invite them to the open house event!
* **Let workers know you are coming!**
* Send out an email blast people we represent in the workplace, telling them who will be coming and may stop by their workspace Consider hosting and inviting them to an open house style event in the breakroom. Doughnuts are always a crowd pleaser!
* Send this 1-2 weeks out with a calendar invite if the open house style event
* **Identify who is bringing what. We recommend the following:**
* Swag: Buttons, stickers, pens, lanyards! Your local may have t shirts or mugs available for people when they sign up to become members.
* Membership cards: These are great to have not only to sign people up but to leave behind!
* Sign in sheet! (You can find one to use by clicking here or flipping through this toolkit)
* Food/Drink for open house events:
* AM: Doughnuts and coffee
* Noon: Pizza or sandwiches
* PM: Snacks and Soda/ Doughnuts and coffee
* To consider: Is there a gluten free option you can grab one or two of? Apples and granola bars are usually good for people with food sensitivities if you don’t know.
* **Remind workers you are coming!**
* **Check in with your site lead if you have one.**
* Everything good to go?
* Do you still have the space?

**Report back:** Write a short email to your CAT team about the event! What did you talk about, how many attendees, did you run into any issues, etc. This report out is really important for tracking what is working.

Open house style event check list.

* **Identify team members; who is helping you for this event?**
* For open house style events your CAT team and membership secretary will be most helpful.
* **Do some research**
* Where are members working? If on site, could your event happen onsite?
* What time would work best? AM or PM? If members are communting to attend the event something after work hours would work better. If members are already at the worksite, something during lunch or in the morning would work better.
* **Set a date, time, and a goal**
* Plan for 1.5 hours depending on the event.
* Happy hours in the evening tend to go on longer and have less of a definitive end.
* A coffee klatch is usually less than an hour and people don’t stick around.
* Do you want to give a negotiations update? Do a fun, social gathering event? Do you want this to be a stop in and say hi or a longer meeting.
* *Have an answer for the question: “What is this for?”*
* **Invite people!**
* Send out an email blast to people you want to attend.
* Send this 1-2 weeks out with a calendar invite if the open house style event
* If your team has a lot of energy about this, pull a list of the local, split it up and call people! Use a sample script found later in this toolkit.
* **Contact location:**
* If worksite, who can let the office manager know they need a conference room or will be using the breakroom?
* If off site, who will find a location and let them know a group of people are coming? **Do this at least a week in advance if you can.**
* **Identify who is bringing what. We recommend the following:**
* Swag: Buttons, stickers, pens, lanyards! Your local may have t shirts or mugs available for people when they sign up to become members.
* Membership cards: These are great to have not only to sign people up but to leave behind!
* Sign in sheet! (You can find one to use by clicking here or flipping through this toolkit)
* Conversation tracking sheet (You can find one to use by clicking here or flipping through this toolkit)
* Food/Drink for open house events(workplace):
* AM: Doughnuts and coffee
* Noon: Pizza or sandwiches
* PM: Snacks and Soda/ Doughnuts and coffee
* To consider: Is there a gluten free option you can grab one or two of? Apples and granola bars are usually good for people with food sensitivities if you don’t know.
* Food/Drink for happy hour/lunch (off-site)
* We can’t pay for alcohol, but we can pay for non-alcoholic drinks and food.
* **Assign roles:**
* Sign in enforcer
* Chat/waiting room watch if virtual
* Opener: Who welcomes everyone and hands off to first speaker?
* Closer: Who thanks people for coming and moves the meeting from structured to unstructured?
* **Remind workers of the event 2 days before and the day of!**
* **Make sure people sign in!**
* **Report back:** Write a short email to your CAT team about the event! What did you talk about, how many attendees, did you run into any issues, etc. This report out is really important for tracking what is working.

One to one check list

* **Read through one to one training! (optional)**
* **Set your targets:**
* Who do you want to talk to? Focus on people who are either:
* Workplace leaders (they have followers, not necessarily that they are active with the union)
* New potential members
* Is there a specific event you are tying these one to ones to?
* Are you spending the morning doing one on ones and an afternoon doing a site visit?
* Are you scheduling half a day to focus on a specific group of workers?
* **Get contact information, send an invite.** **You can find a sample email here or on page #.**
* **Have one to one**
* **Report back: Let your lead or your BA know how your conversation went!** You can track the conversation either on this google form or with your paper conversation tracker found on page.

Phone bank check list.

* **Identify team members; who is helping you for this event?**
* Send invite.
* **Set a date, time, and a goal**
* Plan for 3 hours so you have time to talk through the script, make calls, and debrief.
* What is the point? Here are common reasons:
* **To do general recruitment:** this is a great way to get the a lot done, you can ask them to sign onto the platform and join RRT, AND invite them to an event/local meeting.
* **Event invites:** Invite people to an event.
* **Membership recruitment:** Ask them to become a member.
* Consider having prizes or games. They add a little bit of creativity. [You can find a bingo card for the phone banks here.](https://bingobaker.com/#5635152) ([https://bingobaker.com#5635152](https://bingobaker.com/#5635152))
* **Make a call script.** You can find one linked here. This script is general so you will have to add in the extra information. Copy and paste it into a different document to edit.
* **Remind people of the phone bank via email.**
* **Report back:** Write a short email to your CAT team about the event! What did you talk about, how many attendees, did you run into any issues, etc. This report out is really important for tracking what is working.

House visit check list

* **Set your targets:**
* Who do you want to talk to? Focus on people who are either:
* Workplace leaders (they have followers, not necessarily that they are active with the union)
* New potential members
* **Get contact information, including address (work with your BA) and email your targets a few days ahead of time letting them know you will swing by.** **Use this sample email.**
* **Use house** **visit script and have conversation.**
* **Report back: Let your lead or your BA know how your conversation went!** You can track the conversation either on this google form or with your paper conversation tracker.

Page Break

Small group meeting check list

* **Identify team members!**
* Site leads?
* Local leaders?
* CAT members?
* Is there an emerging leader you can ask to fill a role?
* **Identify member/potential member targets:**
* It’s best with a group of people with something in common, an agency, worksite, division,, or demographic group. (Example: Parents, DHS investigators, DNR foresters,)
* **Set date, time, and goals:**
* What is the goal?
* Why is this specific group getting together to talk about the contract? Do we want their feedback? Do we want them to see they have common reasons to be fighting for the contract?
* Ultimately you want to lead a conversation about the importance of the contract, becoming a member, and getting involved. You will ask people to join the RRT, CATs, and to become a member. **Prepare for and practice a hard ask for the end of the meeting.**
* **Invite people!**
* Send out an email blast to people you want to attend.
* Send this 1-2 weeks out with a calendar invite if the open house style event
* If your team has a lot of energy about this, pull a list of the local, split it up and call people! Use a sample script found later in this toolkit.
* **Remind people of the event via email.**
* **Decide what to bring and who is going to bring it.**
* Swag: Buttons, stickers, pens, lanyards! Your local may have t shirts or mugs available for people when they sign up to become members.
* Membership cards: These are great to have not only to sign people up but to leave behind!
* Sign in sheet! (You can find one to use by clicking here or flipping through this toolkit)
* Conversation tracking sheet (You can find one to use by clicking here or flipping through this toolkit) (find the virtual one here)
* **Assign roles:**
* Sign in enforcer
* Chat/waiting room watch if virtual
* Opener: Who welcomes everyone and hands off to first speaker?
* Closer: Who thanks people for coming and delivers the hard ask.
* **Report back:** Write a short email to your CAT team about the event! What did you talk about, how many attendees, did you run into any issues, etc. This report out is really important for tracking what is working.

Teams’ conversation check list

* **Set your targets:**
* Who do you want to talk to? Focus on people who are either:
* People we haven’t heard from or people we want invest in.
* New potential members
* Identify if you can contact them via teams.
* **Contact them!** DMvia teams to see if they are available to talk for 15 minutes or ask if you can schedule a 15-minute chat about MAPE. **DO NOT *write* that you are planning to talk to them about membership or negotiations.** Be general but share more when you talk.
* **Use this script or loosely follow along to ask them about:**
* Becoming a member (if applicable)
* Joining the RRT
* Signing onto the platform.
* **Report back: Let your lead or your BA know how your conversation went!** You can track the conversation either on this google form or with your paper conversation tracker found on page.

Text Bank Check list

* Identify with your BA if you should be using a text bank. These are the most common reasons:
* Event reminder
* Statewide text bank
* They should not be used for:
* General updates
* Membership asks
* [Follow the instructions here](https://docs.google.com/forms/d/e/1FAIpQLSdeWmkAvad3gBbOl-uaCVHMNiqOeUdcT_QMYKhVA7j9q8HFTA/viewform?fbzx=1190938857605319758).