Chapter leaders, activists, government relations chairs and members:

In Oregon, getting involved in local races is a guaranteed way to affect the issues that matter most to OSEA members, such as outsourcing, school funding decisions and the right to collective bargaining. These board positions affect OSEA members tremendously. But far too often, the same board members run unopposed and are elected again and again regardless of their stances on our issues. The good news is this document contains the information you need to get started in running a successful local campaign.

Please note that the following information is targeted to assist chapters specifically with running school board campaigns and may not pertain to chapter members in community colleges, ESDs, and park and recreation districts. The Government Relations Office (GRO) is happy to speak directly with those chapters to address their unique concerns.

It is our hope that the following information will provide members with first steps to creating and implementing a successful school board campaign. As you go forward, the government relations staff is eager to assist chapters in refining strategy and developing a plan that uniquely suits each chapter’s specific needs and district. We hope this step-by-step guide will be useful. If upon reading the document, you come up with additional questions or ideas you would like to see included in the future, please let us know.

Ed Edwards
OSEA Director of Government Relations
800-252-6732
ed@osea.org

Bob Estabrook
OSEA Government Relations Specialist
503-508-5203
bobe@osea.org
# Table of contents

Creating a winning campaign plan in 10 steps

1. Reviewing the basics
2. Getting started
3. Forming a race committee
4. Research and assessments
5. Recruiting candidates
6. Creating a candidate questionnaire
7. Interviews and endorsement
8. Community outreach
9. Get out the vote
10. Maintaining an active relationship

“All politics is local.”
“If you’re not at the table, you’re probably on the menu.”

What is a school board?
A school board is a legislative body of community members elected locally by their fellow citizens. In Oregon, school board members are elected for four-year terms and serve without pay. Half of the roughly 1,500 board members from approximately 200 districts in Oregon’s school, community college and education service districts are elected or reelected in each odd-numbered year. In most cases, there are five school board members (though some districts have more.) The election process calls for half (usually three) of the members being eligible for reelection during one election cycle and the other half (usually two) being eligible in the next cycle. This 3-2 rotation eliminates having all new members on a school board and helps ensure consistency and continuity.

Why do school boards matter?
School boards make many of the policy, funding and hiring decisions affecting Oregon’s schools including: negotiating contracts with unions, permitting or denying charter schools, allocating taxpayer funds, supporting bonds and facility improvements, and making hiring decisions about the superintendent. In addition, school boards also adopt textbooks and courses of study, enter into written agreements and collective bargaining contracts, implement policy decisions, establish the length of the school term and set overarching educational goals.

How do school board decisions impact public employees?
Having labor-friendly members run for and win school board seats can drastically improve the working conditions for OSEA members. Changing just one seat to a pro-labor school board member can drastically tip the vote in favor of issues positively impacting public employees, including support on collective bargaining, contracting out and budget decisions.
“A barking dog is often more useful than a sleeping lion.”

The process

This guidebook was created by the OSEA government relations office as a roadmap for chapter leaders, activists and union members interested in taking part in local races. In the following pages, you will find multiple approaches to implementing a successful school board campaign. Because there is no “one size fits all” campaign plan, it’s important for each chapter to craft a unique campaign plan that suits the needs of your members. Together, you are the experts on issues affecting your work and your community.

When to begin?

The sooner the better! Having an effective strategy can make or break a school board campaign. It’s never too early; some chapters choose to be highly involved in every stage of a campaign. This process often begins well in advance of election season by identifying and recruiting new candidates. Other chapters choose to focus solely on interviews and endorsements. In order to tailor a plan that suits your chapter, it’s important to begin by taking stock of internal and external issues.

Internal and external planning

By talking with other members, you will identify the “internal” issues facing your chapter as a group. This step is easy to take for granted, but it’s important to survey all members and not make assumptions. These issues will help you establish priorities and remind you of your common agenda. For example: what issues are important? Are these key issues being addressed by the current school board? Next, it’s equally important to consider “external” issues of the broader community. By taking the time to consider the major topics facing students, parents and community members, you’ll be well informed about the range of topics the candidates are facing and able to craft effective communication strategies to reach both internal and external audiences.
“Alone we can do little, together we can do so much.”

Can’t I do it alone?

The success of any campaign will depend on the level of involvement of chapter members. The first opportunity to begin conversations with members about upcoming races is usually when the chapter president adds the item to the chapter meeting agenda. Don’t be surprised if, at first, few members seem interested in upcoming school board races; members often appear uninterested because they haven’t been invited to participate in the strategizing process. After asking introspective questions about the current school board and speaking with other members about the issues they care about, members may be more inclined to get involved. The second step in the campaign process is forming a race committee. A committee will take ownership of the planning process and delegate assignments. Anyone can participate, this group can be made up of executive members, chapter leadership and/or any interested members.

Where to start?

Once the chapter decides they are interested in taking part in upcoming races, the next step is to find a convenient location for your first committee meeting. Make sure to get the word out about the meeting logistics including date, time and place. Usually people are more inclined to attend if asked face-to-face or over the phone. However, it’s still a good idea to send out an e-mail to all chapter members to ensure that everyone is included. Typically, a committee is made up of at least four members but, depending on the size and needs of the chapter, this number can vary significantly.

Planning

As a group, you will begin to identify and prioritize your goals. It’s important to take notes so you can refer to previous decisions and gauge whether you are staying on task. Once the committee members are identified, you are ready to begin assessments.
“Success will never be a big step in the future, success is a small step taken just now.”

**Knowing what you know**

Successful campaigns depend on good research. Essential dates and information can be found on the secretary of state’s website. Begin with the key dates for the next election and voter registration deadlines. Specific information about filing dates and requirements can be found on your county website. Note how many seats will be up for election. Have incumbents filed to seek reelection? It’s important to find out the names of all candidates. This information can be obtained once the filing date has opened. Once you get a name, a simple google search can usually reveal the person’s work history, party affiliation and geographic location. For more detailed information, you can search for bios, campaign disclosure forms and financial disclosures.

**Board member assessments.**

Building a profile for each current board member will help you evaluate whether they are an ally or enemy of your interests. To do so, it can be helpful to review the minutes of previous board meetings. In addition to basic board member demographic data, it’s important for the committee to consider:
1. What is the chapter’s current relationship with the board member?
2. How have they voted on classified issues?
3. What are their strengths and weaknesses?

**Calendar**

School employees have busy schedules. Without a calendar, it’s easy to let important information slip through the cracks. Creating a campaign calendar will provide a measurable way to achieve goals and meet deadlines. Besides the election date, a few important dates are the first and last day to file for candidacy, the voter registration deadline, and any applicable canvass and phone bank opportunities. All tasks should be given timelines and be added to the calendar.
“The only real training for leadership is leadership.”

**Recruiting Candidates**

**Who should run for school board?**

Each day you are surrounded by people who would make excellent board members. There are many retirees and community members who might be willing to serve as board members, but they’ve never been asked and never considered running. Recruiting new candidates takes time, so it’s important to begin early. When thinking of potential candidates, it’s helpful to survey the membership for community contacts from local organizations and civic groups. Brainstorm with members to come up with a list of organizations, fraternal and community groups, and other allies such as school groups and affiliate unions. Together you may be able to identify new names of individuals who may consider running.

**Eligibility**

Board members are elected from the district at large. Board elections occur in May of each odd-numbered year. To be eligible for election to the board, a person must be a registered voter and have been a resident of the school district for one year immediately preceding the election. A board member cannot be an employee of the school district. However, members who work in one district but maintain a residence in another are eligible to run in their district of residence.

**The decision to run for school board**

Members of the public don’t need previous political experience to serve, and because so few people make an attempt to run, in some situations the seat can be easy to obtain. In some races candidates run unopposed. It’s important for all potential candidates to consider outside time commitments, the impact the role may have on their family and a thoughtful understanding of their stance on issues. Prior to running, it’s also important to gather background information on the current candidate (also know as an incumbent) seat such as the the percentage of the vote they received in the previous election.
“Never separate the life you live from the words you speak.”

**What’s in a candidate questionnaire?**

Because candidates are *NOT* endorsed based on political affiliation, it’s critical to get a detailed understanding of the candidate’s stance on the labor and education issues that matter most to OSEA members. Candidate questionnaires provide a written document that can be used in reviewing criteria for endorsement. All candidates must be given the opportunity to take part in the process. The questionnaire is usually two or three pages long and is comprised of both short and long form questions covering education and work-related issues. Short questions usually cover background information such as occupation, previous experience and motivation. Longer questions usually require more in-depth answers and relate to the most pressing issues facing the chapter, such as the candidate’s stances on contracting out, budget cuts and recognition for classified employees. These questions encourage the candidate to think more deeply about issues facing our members and serve to clarify any ambiguity about the candidate’s position.

**The process**

Once committee members have formulated the key issues facing the chapter, they can begin crafting a candidate questionnaire. It usually helps to create an extensive list of questions and then narrow them down to the most relevant. It’s necessary to stay on topic and avoid irrelevant questions. This information will represent the chapter, so make sure to proof the document for any grammatical errors and spelling mistakes prior to distributing it. Next, a final draft should be given to chapter leadership for final comments and approval. Before sending it, attach a cover letter with an introduction and outline of the process. Don’t forget to add a return deadline with enough time to schedule interviews. Finally, make sure you have updated address and e-mail contact info for each candidate and decide which committee member will be in charge of the distribution and tracking process.
Interviews & Endorsement

“With us, not to us.”

The interview

Completed candidate questionnaires should be received by a specific date in order to be considered. Some candidates may not return their questionnaire. When this happens, it’s customary to do a follow-up call. Candidates who refuse to fill out a questionnaire will not be considered for endorsement. The next step is scheduling candidate interviews. All committee members should participate in the candidate interview process, but the interviews can also be open for other chapter members to attend or observe. The interview team usually consists of four or five members. It’s helpful to schedule interviews with multiple candidates on the same date in order to avoid meeting on multiple occasions. Interviews generally take between 20 and 30 minutes to complete. The team should arrive early to go over the process and assign questions and roles such as taking notes, greeting the candidate, keeping track of time and keeping the interview focused.

The endorsement process

It’s important to restate that candidates are NOT endorsed based on political affiliation. All candidate endorsements must be made based specifically around the chapter’s issues and not political party. Once the interview team has reached an agreement and they’ve completed the endorsement form, their recommendation should be given to the executive board for consideration. Some executive boards bring the decision before the chapter for a vote, while other chapters allow the executive board to make a final decision based on the questionnaire and interview recommendations. Either way, it’s important for the committee to keep detailed notes of the process. Members may want to know the reason why a specific candidate was not endorsed and it can be helpful to have written documentation showing they refused to fill out a candidate questionnaire or meet with the interview team. By keeping members updated and informed, you ensure that the process is fair, transparent and open for members to participate at every level of the interview and endorsement process.
Community Outreach

“In unity there is strength.”

Mobilizing the community

By forming coalitions with the broader community, your chapter builds a base of support. In doing so, you strengthen the union’s relationship with the other groups and increase their likelihood of voting for your candidate. The first step in community outreach is to survey your membership. Who do they know and what groups or organizations do they belong to? These individuals and organizations include concerned citizens, key stakeholders, neighbors, parents, civic groups, nonprofits, clubs, churches, sports leagues, affiliate unions, etc. These groups and organizations often share concern about your issues, especially when kept informed by a person with whom they already have a relationship. Before you begin outreach, it’s helpful to determine what you would like others to do.

Are you asking them to vote, volunteer on the candidate’s campaign or are you simply informing them about your issues?

Communications

Successful communication strategies can change the public’s perception about your candidate and your issues. The more people you inform, the more likely they are to vote for your candidate. First, it’s important to determine your internal and external communication strategies. How will you keep members informed and engaged? Have you created a message or slogan? Do you have a statement for your newsletter and an updated list of member e-mail addresses? Do you have background information and talking points for targeted populations? Flyers can be an excellent way to get the word out about your candidate at meetings. In addition to face-to-face conversations, other strategies can include writing op-eds, publishing ads, organizing earned media events and attending candidate forums. It’s important to create communication materials that work for your community. By keeping allies informed and providing visibility about your message, you increase opportunities for others to become both informed and engaged.
**get Out the Vote**

“Bad officials are elected by good citizens who do not vote.”

**Every vote counts**

All of your previous outreach and mobilization leading up to this point will have no effect unless your supporters remember to vote. School board races are determined by a small margin and many Oregonians are often unsure who to vote for or forget to mail their ballot. That’s why taking part in a “get out the vote” drive is critical. One frequent question that usually comes up in GOTV drives is about registration. It’s helpful to print out information from the secretary of state’s website about voter registration criteria. Double check the voter registration deadline so you can remind members and neighbors to register, especially if they’ve never voted or have recently moved. Your chapter should begin GOTV outreach shortly before ballots “drop” or are mailed to voters. Some chapters choose to send volunteers to canvass on a candidate’s campaign while other chapters choose to lead their own canvasses and phone banks. Either way, contact information, ballot drop locations, and printed materials such as scripts, turf, yard signs and door hangs should be organized prior to your GOTV launch. At the very least, all chapters can remind members to mail in their ballots and encourage their friends and family to do the same.

**Fundraising**

Launching a fundraising drive in your chapter in support of OSEA’s Education and Labor Advocacy Fund (ELAF) can go a long way in getting labor-friendly candidates elected and pro-education ballot measures passed. There are other creative ways to raise contributions such as sponsoring a spaghetti night or a candidate meet and greet. Prior to collecting any funds, it’s important to check in with the Government Relations Office to ensure that your fundraising plans meet OSEA guidelines and state law. Each state has different regulations for candidate contributions and, in some cases, contributions will need to be made directly from the union’s political action committee (PAC).
Ongoing relationships

“You can’t do it unless you organize.”

Once a school board is elected

After the election, no matter what the outcome, it’s a good idea to organize a celebration to recognize the committee’s work. Next, it’s custom to send a congratulatory letter to all winning candidates regardless of whether they were endorsed. Over the years ahead, it’s beneficial to have classified staff attend school board meetings as often as possible. Board members regularly hear from parents and teachers but rarely hear firsthand accounts from cooks, bus drivers and numerous other classified positions. Because school board members make so many decisions affecting school employees, including selecting the superintendent, it’s imperative for them to understand the contribution of OSEA members. Having a union presence at board meetings not only provides visibility for classified employees, but also illustrates our connection to the school and the district. Meetings are also helpful for classified staff to stay abreast of the issues facing the school district and to gain a greater understanding of each board member’s stance for use on future campaigns. Maintaining this active relationship by not only showing up, but voicing concerns and offering suggestions when applicable, helps the board relate to our jobs and the work we do. Over time, the board will begin to recognize faces of union members and deepen their understanding of how their decisions impact our lives and our work.

Building lasting power

Winning tomorrow is up to you today. Getting involved in local races and attending ongoing school board meetings is a guaranteed way to make a lasting impact on your working conditions and the future of education in your district. It is our hope that this information has assisted you in strategizing a step-by-step campaign to reach those goals. The government relations staff is eager to work with you to develop a plan that meets your chapter’s needs. If you have questions that were not adequately answered in this document or have information to share about your school board, please let us know.