

CTA Organizing Plan: Local Planning Grants

Overview

This CTA grant program provides financial resources to your local union to support the development of a strategic organizing and member engagement plan. This grant program supports a local planning process that utilizes the [Our Local Union Strength](#) and the [Checklist for a Well-Organized Worksite](#) planning tools.

CTA staff support and training are available to assist you in planning and conducting an effective local planning meeting. Please contact your CTA Primary Contact Staff for assistance.

Additional grant resources, tools, and training are available through the [CTA Organizing Plan](#) to support a local Site Visit program and presidents release time for organizing.

LOCAL PLANNING RESOURCES

Check out these tools to help your chapter conduct an effective planning session that deepens member engagement and organizing!

- [Worksheet: Our Local Union Strength](#)
- [Worksheet: Checklist for a Well-Organized Worksite](#)
- [Sample Agenda: Local Planning Meeting](#)

Timeframe

**One Local Planning Grant per academic year.
Rolling Applications accepted.**

Local unions may apply for one Local Planning Grant per academic year. All reimbursement receipts must be submitted by August 31.

Eligible Expenses

1 Release Time: One release time day to participate in the chapter's strategic planning process for local elected Executive Board members who are not otherwise on release time up to a maximum of 10 Executive Board members.

— OR —

2 Meeting Expenses: If the planning session is held on non-work time (e.g., weekend, work holiday, or summer) and no release time is utilized, certain meeting expenses may be reimbursed for up to \$200 per elected Executive Board member up to a maximum of 10.

Grant funds may be used to cover release time expenses or meeting expenses; not both.

Release Time

- **Covered Costs:** Release time is available for one-day for each of your association's elected Executive Board members who are not otherwise on release time up to a maximum of 10 local Executive Board members.
- Grant release time is based on the actual number of elected Executive Board members your local association has up to a maximum of 10 people. Costs incurred for additional Executive Board members beyond 10 would need to be covered by the local chapter.
- **Release Time Reimbursement Process:**
 1. Your local association is responsible for requesting release time with the district. Contact your CTA Primary Contact Staff for a sample release time request form, if needed.
 2. When the District sends the release time invoice to your local association, you can process it in one of two ways:
 - a. The local chapter pays the invoice with the district and then submits the paid invoice through the grant reimbursement process with other required documents. The CTA grant program will reimburse the local association for this paid invoice.

— OR —

- b. The local chapter submits the unpaid invoice through the grant reimbursement process with other required documents. The CTA grant program will pay the invoice directly to the district.

— OR —

Meeting Expenses

- If the planning session is held on non-work time (e.g., weekend, work holiday, or summer) and no release time is utilized, certain meeting expenses may be reimbursed for up to \$200 per elected Executive Board member up to a maximum of 10.
- Grant reimbursement maximum for meeting expenses is based on the actual number of Executive Board members your local association has up to a maximum of 10 people.
- Reimbursement is available for meeting room rental, lodging, food, mileage to and from the meeting, and meeting materials (i.e. flipchart paper/markers/tape for use during the meeting in order to record your team's discussion and action plan, venue A/V charges, participant binders/folders for handouts, photocopies, and nametags). Itemized receipts must be provided. Expenditures must be aligned with [CTA member expense guidelines](#).

Program Requirements & Expectations

Grant application and reimbursement requests under this grant program will be evaluated according to the following criteria and guidelines:

- *Local elected Executive Board members and their non-work contact information are listed in your application.*
- *The strategic planning meeting agenda and resulting written plan emphasize member-to-member organizing and are aligned with the planning tools: [Our Local Union Strength](#) and [Checklist for a Well-Organized Worksite](#). Plans should emphasize organizing goals and activities that strengthen*

site-based outreach to bargaining unit members via systematic 1:1 conversations, small group meetings, and union site meetings; identifying and recruiting site leaders; utilizing union site structures for member outreach and organizing; new membership recruitment; and organizing campaigns (e.g. for collective bargaining, member-to-member program for district board races, community schools, or local issue organizing).

- *All plans must include measurable goals, action steps, who will be responsible for plan implementation, and timelines.*
- *All applications must include a budget.*

Who May Apply

CTA Local Union Affiliates may apply for one Local Planning grant for each academic year. This is an Affiliate Grant Program for local union associations (i.e., not meant for individuals, service center councils, or other organizations.)

Who Must Sign Off

The local chapter president and CTA primary contact staff person must sign-off on the application. Their electronic signature acknowledges the application is in alignment with the local affiliate's priorities since the local chapter affiliate is the recipient of the grant funding. The CTA Regional Managers will review and approve grants and reimbursement requests.

How to Apply

The application form is available at cta.org/orgplan.



Updated May 2024

CTA Organizing Plan: Local Site Visit Grants

Overview

This CTA grant program provides member release time to your local union to support regular worksite visits. CTA staff support and training are available to assist you in planning an effective local site visit program. Site visits should center around union priorities such as asking unit members to join the union, preparing for bargaining and organizing to win a strong contract, member-to-member programs for school board elections, a community schools campaign, organizing around professional practice issues, or organizing around other union issues. Please contact your CTA Primary Contact Staff for assistance.

Additional grant resources, tools, and training are also available through the [CTA Organizing Plan](#) to support your local in implementing a local planning day with your Executive Board, and presidents release time for organizing.

LOCAL SITE VISIT TOOLS

Check out these tools to help your chapter plan and conduct an effective site visit program that deepens member engagement and organizing!

- [Overview: Planning a Site Visit Program](#)
- [What Does Site Visit Planning Look Like?](#)
- [Site Visit Checklist](#)
- [Site Visit Planning Worksheet](#)
- [Sample Tracking Sheets](#)
- [Site Visit Conversation Tracker](#)
- [Sample Meeting Agenda & Talking Points](#)
- [Training for Site Visit Teams](#)
- [Select Readings/Case Studies for Discussion](#)

Timeframe

**One Site Visit Grant per academic year.
Rolling applications accepted.**

Local unions may apply for one Site Visit Grant per academic year. All reimbursement receipts must be submitted by August 31.

Grant funds may be used for release time

The grant may be used for release time to plan and conduct a local site visit program.

Release time is available for up to the equivalent of one day per actual worksite with a maximum of the equivalent of 20 release time days.

If your president or other local officers are currently on release time, this grant program provides your chapter *additional* release time to plan and conduct site visits. Grant funds cannot be used to cover existing release time. This program is intended to expand existing capacity for member-to-member outreach at worksites.

Release Time Reimbursement Process:

- 1 Your local association is responsible for requesting release time with the District. Contact your CTA Primary Contact Staff for a sample release time request form, if needed.
 - 2 When the District sends the release time invoice to your local association, you can process it in one of two ways:
 - a. The local chapter pays the invoice with the district and then submits the paid invoice through the grant reimbursement process with other required documents. The CTA grant program will reimburse the local association for this paid invoice.
- OR —
- b. The local chapter submits the unpaid invoice through the grant reimbursement process with other required documents. The CTA grant program will pay the invoice directly to the district.

Program Requirements

Grant applications and reimbursements will be evaluated according to the following criteria and guidelines:

- *List Chapter Site Reps and their worksite and non-work contact information in your application.*
- *Identify a local leader to serve as the point person for your local site visit program. CTA will provide tools, training, and staff support to help your point person design and implement an effective local site visit program. You will list this person on your chapter's grant application.*
- *Involve your local chapter leadership team in discussing the grant application and conducting the site visit program.*
- *Conduct one or more of the following site-based outreach activities in a systematic way tracking your progress as described in [Planning a Site Visit Program and its related tools](#).*
 - 1:1 Conversations: A designated time to prepare union site representatives to have conversations with bargaining unit members at their site around a set purpose and goal within a designated time period.
 - Union meetings at every site conducted by local officers and union site representatives.
 - Union meetings in smaller site clusters, for example, by department, floor, or job classification.
 - Virtual meetings for every site.
- *Provide a recent bargaining unit list (i.e. AB119 list) from within the past six months to your CTA Primary Contact Staff.*
- *Submit a short, final grant report with your reimbursement request, including your site visit plan, schedule, and how many members were reached and involved.*

Who May Apply

CTA Local Union Affiliates may apply for one Local Site Visit grant for each academic year. This is an Affiliate Grant Program (not meant for individuals, service center councils, or other organizations).

Who Must Sign Off

The chapter's leadership team must support the grant application to ensure there is buy-in for conducting a local site-based outreach program. The local president and CTA primary contact staff person must sign-off on the application. Their electronic signature acknowledges the application is in alignment with the local affiliate's priorities since the local affiliate is the recipient of the grant funding. The CTA Regional Managers will review and approve grants and reimbursements requests.

How to Apply

The application form is available at cta.org/orgplan.



Updated May 2024