

Self-Assessment of Local Union Strength and Growth

Use this assessment tool to understand your local's strengths and areas for growth. This assessment will give you greater clarity for developing your plan and identifying your goals for coaching.

Make a copy of this assessment, and in the column on the left write the number 1-3 that best describes your local union. At the end of each section, add your total number. Once the rating is completed, add the rating numbers together by section and overall. Then also answer the general questions either in writing or through a conversation with your team or coach. We encourage teams to use this tool to build a shared understanding of their work ahead.

Organizing and Engaged Membership				
	Rating	1	2	3
Engagement		Members actively and regularly participate (60%+) in meetings, events, actions, and campaigns; active communication and involvement across all levels of the union; there is intentional and routine assessment of race, class, and gender inclusion with visible outcomes.	Members participate occasionally (30%-60%); inconsistent communication; some efforts to involve members; stated equity and inclusion goals in the local.	Limited member participation and limited communication (<30%); engagement activities are rare or ineffective.
Structure		Clear, well-defined leadership roles and committees; effective organization supports union goals and member needs; there is a visible and measurable representation of leaders across race, class, and gender identities.	Basic structure in place; some roles or committees are unclear or underutilized; moderate effectiveness; there is a stated intent to be inclusive of all race, class, and gender identities.	Lack of structure or poorly defined structure; leadership roles unclear; few ways for members to get involved or have input, union participation is represented by one social group; a small core of the same people do all the work.
Growth		Consistent and strong recruitment and retention strategies in place; membership recruitment tactics include strategies to intentionally recruit across race, class, gender identities, ability, language and other potential equity-based barriers.	Some growth observed; recruitment and retention efforts are sporadic or partially effective; demographic data is collected and occasionally analyzed, but there is little effort to intentionally reach out to underrepresented groups.	Membership stagnant or declining; little to no active recruitment or retention strategies.
Leadership Development		Comprehensive programs in place to identify, train, and mentor future leaders; leadership opportunities are accessible and actively promoted; leaders are involved with campaigns and activating the membership; intentional recruitment	Some leadership development activities offered; identification and mentoring of leaders is inconsistent; there is a belief that diversity of leadership is good for the union.	No or minimal leadership development; few or no opportunities for members to develop leadership skills.

		across race, class, and gender identities into all aspects of leadership development.		
Majority Status		Union holds clear majority status with membership over 80%; this status is actively maintained and leveraged for member benefit.	Union has majority status between 50% and 80%, with fluctuating membership or contested recognition.	Union holds less than 50% membership or lacks majority recognition; limited influence over workplace decisions.
Committees		Committees are active, well-organized, and effectively contribute to union goals; committees have broad member participation and clear outcomes; Union leadership is intentional about recruiting and supporting committee leaders and members who represent diverse constituencies.	Committees exist and operate intermittently; some member involvement and moderate impact on union activities; there is a belief that all committees should be diverse.	Committees are inactive, poorly organized, or non-existent; minimal member participation and limited contribution to union goals; members don't know how to join committees or what success looks like.
Calendared Events		Union regularly plans and executes a comprehensive calendar of well-attended events that engage members and support union goals; these events have a number of ways that participants can access them; translators are available.	Some events are planned and occur with moderate attendance; calendar may be inconsistent or incomplete; some planning for accessibility happens for some meetings.	Few or no events are planned; attendance is low; calendar is poorly managed or non-existent.
Organizing + Engaged Membership Total				

Bargaining and Worksite Advocacy

	Rating	1	2	3
Bargaining		Bargaining process is well-organized, member-driven, and engages community partners or coalition. Wins achieve strong standards for work, education, and community issues. Members are informed and involved throughout; intentional engagement and bargaining strategies designed to center equity in the process and outcomes.	Bargaining occurs with moderate member input; contracts meet some but not all member needs; communication is occasional; there are attempts to be inclusive in communications; bargaining typically stays focused on workplace issues rather than demands for students, parents or the common good.	Bargaining is poorly organized or lacks member involvement; contracts are weak or ineffective; communication is minimal.
Relationship with Administration		Union drives agenda with administration; union input regularly leads in decision-making; union leads on diversity, equity, and inclusion decisions.	Functional relationship with some cooperation from administration; occasional challenges or communication gaps; union has a stated belief that	Administration disregards the union frequently; minimal communication or cooperation with administration.

			diversity, equity, and inclusion are important.	
Advocacy		Union actively advocates for member rights and community interests often in coalition with others, perhaps incorporates bargaining for the common good; effective campaigns and sustained efforts to set policy and win public opinion; union members participate in lobby days or other policy advocacy; union is a clear leader in race, class, and gender justice.	Some advocacy efforts made in terms of engagement with elected officials but does not translate into gains or change; not involved in active coalitions; elected leaders or staff engage in advocacy but members have limited involvement; union has a stated social justice belief.	Little to no advocacy; efforts are minimal, uncoordinated, or ineffective in advancing member or community interests. Local does not have a member rights campaign. Local does not have a plan to coordinate with community supporters to win.
Site Access		Union staff and leadership has full access to all worksites for meetings, outreach, and organizing activities protected by contract language; or when staff is barred from entry, well-trained building reps are able and willing to do member representation and worksite members are able to effectively organize at all worksites.	Union staff and leadership has limited or conditional access to worksites; some worksites have strong reps and structures that can restrict or challenge organizing activities.	Little to no access to worksites; union presence is minimal or obstructed.
Willingness of Leadership Team to Organize		Leadership team demonstrates strong commitment to organizing efforts; proactively supports and leads campaigns to grow and strengthen the union; they willingly engage in public fights that advance race, class, and gender justice.	Leadership shows some willingness to organize; supports efforts when prompted but lacks consistent initiative; they have some willingness to lead issue campaigns associated with race, class, or gender justice.	Leadership is reluctant or resistant to organizing activities; minimal support or engagement in growth efforts; focus is on services and not organizing.
<i>Bargaining + Worksite Advocacy Total</i>				

Communications

	Rating	1	2	3
Communication		Effective and consistent communication channels exist; all members receive timely, clear, and relevant information in their first language; texting, phone banking and email may be used in member communication; union organizers track the effectiveness of their communications and adjust their communications strategies to increase	Communication channels exist but are inconsistently used; there are some translated documents; some members may miss important updates; there are some efforts at making communications accessible.	Communication is sporadic or unclear; many members lack access to important information; some workers or members don't realize there is a union. Members can't easily access bylaws, bargaining timelines, grievance decisions, bargaining priorities, etc.

		accessibility and improve efficacy as needed.		
Member Education		Comprehensive education programs regularly offered with intentional plans for including all race, class, and gender identities; members are well-informed about rights, contracts, and union activities; programs are developed to intentionally include race, class, and gender identities in materials and content; member education addresses current social issues such as attacks on immigrant families and federal cuts to critical funding.	Some education programs offered sporadically; members have partial understanding of rights and union functions; there are some specialized programs addressing race or gender identities.	Little to no member education provided; members lack understanding of their rights and union roles.
Marketing and Social Media Presence		Union maintains a strong, consistent, and engaging presence across multiple platforms; effectively promotes union activities and grows membership awareness; union may have online communities for members to engage; intentional and targeted plans to reach all race, class, and gender identities.	Union has some presence on social media or marketing channels; engagement and consistency are moderate; there are efforts to reach a diverse audience on multiple platforms.	Minimal or no social media or marketing presence; limited outreach and promotion of union activities.
Mission and Vision		Clear, well-communicated mission and vision guide all union activities; members understand and support these foundational principles.	Mission and vision exist but are inconsistently communicated or understood; partial alignment with union activities.	Mission and vision are unclear, outdated, or not communicated; little member awareness or alignment with union direction.
Communications Total				

Politics and Policy

	Rating	1	2	3
Political Action		Union regularly sets the public perception of the issues in local political campaign. Union actively runs or works in coalitions to run political campaigns and advocacy; members are informed and mobilized; Union centers equity in public education and educator needs in public debate. Union endorsed candidates regularly win. All candidates regularly seek union endorsement.	Some political activity; members occasionally informed or involved in advocacy efforts; union supports and promotes social justice.	Little to no political action; members uninformed or disengaged from advocacy.

Relationship with Governing Board		Union uses equity racial and social justice to drive their advocacy, organizing, and campaign agendas; union leads influential and regular communication with the governing board; membership is activated to strategically interact with the governing board, union routinely runs or works in coalition to run the school board or campus governance.	Some contact and communication with governing board; influence is limited or inconsistent; union is known to support equity work.	Minimal or no effective communication; little influence on governing board decisions.
Collaboration with Other Local Unions and community organizations		Actively collaborates with other local unions and community organizations through joint actions, resource sharing, and coalition building to strengthen collective power; union intentionally centers equity in its decisions about coalition work.	Occasional collaboration with other local unions and community organizations; some joint efforts or communication established; union is supportive of social justice causes.	Little to no collaboration; operates in isolation without partnerships or shared initiatives.
<i>Politics + Policy Total</i>				

Infrastructure				
	Rating	1	2	3
Financial Health		Union maintains transparent, accurate financial records; budgets are well-managed; governance follows best practices ensuring accountability and member trust; has planned for the support of direct-action funding and mutual aid; all financial documents required for affiliation are in order, an equity lens is applied to budget decisions.	Financial records and governance processes are mostly in place; occasional lapses in transparency or management; most financial documents required for affiliation are in order; there is some budget apportioned for social justice programs.	Financial management is poor or unclear; governance lacks accountability, risking member trust and union stability; the union does not have its tax documents in order; union does not have local dues.
Data		Data is contractually provided by management to the union on a regular basis. It is integrated into core union functions, organizing, campaigns and strategic planning. The union uses data to track key metrics and inform resource allocation. The union has dedicated data experts and a secure infrastructure. Data are used to measure key outcomes related to equity. Union leaders and staff at all levels are data-literate and use data	The union has started to use data purposefully for specific campaigns. Some siloed data are used to measure diversity and equity, but not in tracking outcomes. Staff and leaders use basic data analysis to support organizing, bargaining, or communications efforts. The union uses digital tools and databases for basic member and contact management. Access to data is limited to a small group of staff. The union measures the success of	Data use is reactive and inconsistent, often in response to immediate needs like answering a specific question during a campaign. There is no overarching data strategy. Data is managed in siloed systems and analog formats. Digital tools are not standardized, and data analysis relies on a few knowledgeable individuals. The union's use of data has no clearly measured impact on worker outcomes. There is no intentional effort

		to inform their work. The union's data use leads to measurable improvements in member well-being and economic security. Data is used to measure long-term trends in membership engagement and bargaining success. Data insights are leveraged to expand union influence and shape public policy.	specific campaigns using basic data points, such as voter turnout or sign-up rates. Insights are used to adjust short-term tactics.	to measure equity. Campaign successes or failures are not systematically analyzed with data.
Governance		The union membership understands how their union is governed and processes for that run their union; constitution and bylaws are accessible to members and have been developed and maintained with a focus on equity; members are in relationship with multiple levels of leadership and when issues arise members know who to go to; there are union representatives in more than 80% of the worksites, representatives at the school district or university level on decision making committees, leaders re connected to state and national leadership.	The union has a regular schedule to update the constitution and bylaws; updates include the use of an equity lens; there are officer-elections and regularly scheduled executive meetings; officers attend most (meetings, training courses, conferences, the Representative Assemblies); executive meetings are well attended; members are typically not engaged in the governance of their union or aware of policies and procedures for how their union is run; at least 80% of worksites have union representatives.	The union has an outdated or incomplete Constitution and By-Laws, and the union is in a constant struggle to fill leadership positions; there are rarely elections that are contested; less than 50% of work locations have union representatives.
Infrastructure Total				

Assessment by Section and Overall: A lower number indicates an area of strength. A higher number indicates that this is an area for improvement.

1. Has your local set goals for membership growth and participation? If yes, what are they?

2. What do you think are your organization's main strengths that will allow you to build a strong union and effective campaign?

3. Overall, which of the areas above do you think are the largest challenges for your local?
4. In the areas that you've identified as your biggest challenges, what are the main barriers your local faces?
5. Which of the above areas do you think should be the top three priorities for your local to address?