

Make a copy of this assessment, and in the column on the right, add your total number. Once the rating is complete, add your total number. General questions either in writing or through a conversation to gain a better understanding of their work ahead.

Organizing and Engaged Members		
	Rating	1
Engagement	1.5	Members actively and regularly participate (60%+) in meetings, events, actions, and campaigns; active communication and involvement at all levels of the union; there is an annual routine assessment of race, gender inclusion with visible outcomes.
Structure	2	Clear, well-defined leadership roles and committees; effective organizational supports union goals and membership; there is a visible and measurable representation of leaders across race, class, and gender identities.
Growth	2	Consistent and strong recruitment and retention strategies in place; membership recruitment tactics include strategic intentional recruitment across race, gender identities, ability, language, and other potential equity-based barriers.
Leadership Development	1.5	Comprehensive programs in place to identify, train, and mentor future leadership opportunities are accessible and actively promoted; leaders are involved with campaigns and act as a role model for the membership; intentional recruitment.

Majority Status	2	across race, class, and gender identities into all aspects of leadership development.
Committees	1.5	Union holds clear majority status with membership over 80%; this status is actively maintained and leveraged for member benefit.
		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.
Calendarred 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.
Organizing + Engaged Membership Total	1.5	

Bargaining and Worksite Advocacy

	Rating	1
Bargaining	2	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.
Relationship with Administration	2	Union drives agenda with administration; union input regularly leads in decision-making; union leads on diversity, equity, and inclusion decisions.

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.	diversity, equity, important.
Site Access	1.5	Union staff and leadership has full access to all work sites 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 work site members are able to effectively organize at all work sites.	Some advocacy engagement w not translate if involved in act leaders or staff members have has a stated so
Willingness of Leadership Team to Organize	1	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.	Union staff an conditional ac work sites have that can restr organizing acti
Bargaining + Worksite Advocacy Total	7.5		Leadership sh organize; supp but lacks cons some willingn associated rac
Communications			
	Rating	1	
Communication	1.5	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 inconsistently translated doc miss important efforts at maxi accessible.

		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.	
	2		
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.	
Mission and Vision	2	Clear, well-communicated mission and vision guide all union activities; members understand and support these foundational principles.	
Communications Total	7.5		
Politics and Policy			
	Rating	1	
Political Action	1.5	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.	

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 a governing board inconsistent; union equity work.
Collaboration with Other Local Unions and community organizations	1.5	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 coll unions and com joint efforts or union is suppo
Politics + Policy Total	4		
Infrastructure			
	Rating	1	
Financial Health	1	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 rec processes ar occasional la management required for a some budget justice progr
Data	2	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 ha purposefully siloed data e and equity, t Staff and lea support orga communica digital tools member an to data is lin The union m

		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.
Governance	2.5	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.
Infrastructure Total	4.5		

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

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

Short term 70% membership, long term 75%.

- What do you think are your organization's main strengths that will allow you to build a strong union?

inclusion, accessibility,

3. Overall, which of the areas above do you think are the largest challenges for your local?

Domna

4. In the areas that you've identified as your biggest challenges, what are the main barriers your local faces?

*Structure, distractions, reluctance to be too progressive
for fear of offending domon.*

5. Which of the above areas do you think should be the top three priorities for your local to address?

*Clear ^{updated} mission that includes equity & inclusion
• common plan*