

Building Strong Local Affiliates

Affiliate Assessment Tools

Now more than ever, it is clear that strong local affiliates are essential to the growth and strength of the union. At the local, state and national levels – our ability to win on the issues that matter most to our members, students and communities depends on strong local affiliates that have effective systems in place to engage, mobilize, and empower members and potential members.

Affiliates across the NEA have developed a variety of tools to assess the strength and health of local affiliates: identifying a range of criteria that they consider the most important indicators of a local affiliate's well-being.

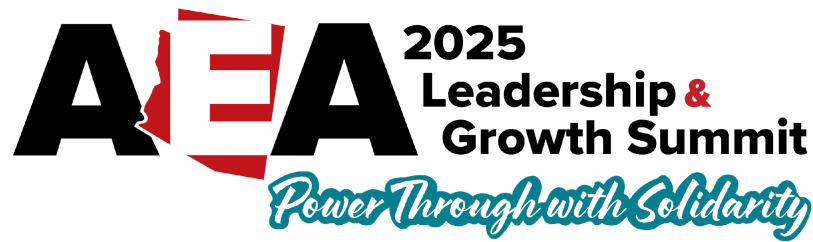
The NEA Center for Organizing and Affiliate Support has begun collecting samples of Affiliate Assessment Tools from across the country. Those resources can be found at: [Affiliate Assessment Tools](#). The following Assessment Tools included here are some of the best examples.

Rubric for Self-Assessment of Local Union Growth and Engagement, Arizona Education Association. Developed by a group of local presidents and members of local Organizing Committees, this framework is particularly useful for states with low to moderate union density (<80%) and less than comprehensive bargaining rights.

Local Planning Toolkit, California Teachers Association. This comprehensive toolkit also includes a robust rubric for assessing local union capacity, along with planning tools. This resource may be of particular relevance to affiliates with comprehensive labor laws, high union density, and established histories of collective bargaining.

Local Association Building Rep/Worksite Structure Assessment, NEA Center for Organizing. This framework was developed by NEA's Year-Round Organizing Program. It is focused on assessing the strengths of the union at the worksite level, so it provides a more granular rubric for assessing union health building by building.





Rubric for Self-Assessment of Local Union Growth and Engagement

Category	High Participation	Partial Participation	Growth Potential
Engagement	Members actively participate in meetings, events, and campaigns regularly; high communication and involvement across all levels of the union.	Members participate occasionally; communication exists but is inconsistent; some efforts to involve members.	Limited member participation and limited communication; engagement activities are rare or ineffective.
Structure	Clear, well-defined leadership roles and committees; effective organization supports union goals and member needs.	Basic structure in place; some roles or committees are unclear or underutilized; moderate effectiveness.	Poorly defined structure; leadership roles unclear; organization hinders union effectiveness.
Growth	Demonstrates consistent and measurable membership growth; strong recruitment and retention strategies in place.	Some growth observed; recruitment and retention efforts sporadic or partially effective.	Membership stagnant or declining; little to no active recruitment or retention strategies.
Relationship with Administration	Collaborative, respectful, and productive interactions; union input regularly considered in decision-making.	Functional relationship with some cooperation; occasional challenges or communication gaps.	Strained or adversarial relationship; minimal communication or cooperation with administration.

Category	High Participation	Partial Participation	Growth Potential
Relationship with Governing Board	Strong, positive engagement; union has influence and regular communication with the governing board.	Some contact and communication with governing board; influence is limited or inconsistent.	Minimal or no effective communication; little influence on governing board decisions.
Political Action	Union actively participates in political campaigns and advocacy; members informed and mobilized.	Some political activity; members occasionally informed or involved in advocacy efforts.	Little to no political action; members uninformed or disengaged from advocacy.
Bargaining	Bargaining process is well-organized, member-driven, and results in strong contracts; members are informed and involved throughout.	Bargaining occurs with moderate member input; contracts meet some but not all member needs; communication is occasional.	Bargaining is poorly organized or lacks member involvement; contracts are weak or ineffective; communication is minimal.
Advocacy	Union actively advocates for member rights and community interests; effective campaigns and sustained efforts influence policy and public opinion.	Some advocacy efforts made; occasional campaigns or initiatives with moderate impact.	Little to no advocacy; efforts are minimal, uncoordinated, or ineffective in advancing member or community interests.
Leadership Development	Comprehensive programs in place to identify, train, and mentor future leaders; leadership opportunities are accessible and actively promoted.	Some leadership development activities offered; identification and mentoring of leaders is inconsistent.	No or minimal leadership development; few or no opportunities for members to develop leadership skills.
Communication	Effective and consistent communication channels exist; all members receive timely, clear, and relevant information.	Communication channels exist but are inconsistently used; some members may miss important updates.	Communication is sporadic or unclear; many members lack access to important information.

Category	High Participation	Partial Participation	Growth Potential
Site Access	Union has full access to worksites for meetings, outreach, and organizing activities; access is unrestricted and well-supported.	Limited or conditional access to worksites; some restrictions or challenges in organizing activities.	Little to no access to worksites; union presence is minimal or obstructed.
Majority Status	Union holds clear majority status with membership over 60%; this status is actively maintained and leveraged for member benefit.	Union has majority status between 50% and 60%, with fluctuating membership or contested recognition.	Union holds less than 50% membership or lacks majority recognition; limited influence over workplace decisions.
Member Education	Comprehensive education programs regularly offered; members are well-informed about rights, contracts, and union activities.	Some education programs offered sporadically; members have partial understanding of rights and union functions.	Little to no member education provided; members lack understanding of their rights and union roles.
Collaboration with Other Local Unions	Actively collaborates with other local unions through joint actions, resource sharing, and coalition building to strengthen collective power.	Occasional collaboration with other local unions; some joint efforts or communication established.	Little to no collaboration; operates in isolation without partnerships or shared initiatives.
Committee Work	Committees are active, well-organized, and effectively contribute to union goals; broad member participation and clear outcomes.	Committees exist and operate intermittently; some member involvement and moderate impact on union activities.	Committees are inactive, poorly organized, or non-existent; minimal member participation and limited contribution to union goals.

Category	High Participation	Partial Participation	Growth Potential
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 has some presence on social media or marketing channels; engagement and consistency are moderate.	Minimal or no social media or marketing presence; limited outreach and promotion of union activities.
Financial Health and Governance	Union maintains transparent, accurate financial records; budgets are well-managed; governance follows best practices ensuring accountability and member trust.	Financial records and governance processes are mostly in place; occasional lapses in transparency or management.	Financial management is poor or unclear; governance lacks accountability, risking member trust and union stability.
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.
Calendared Events	Union regularly plans and executes a comprehensive calendar of well-attended events that engage members and support union goals.	Some events are planned and occur with moderate attendance; calendar may be inconsistent or incomplete.	Few or no events are planned; attendance is low; calendar is poorly managed or non-existent.
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.	Leadership shows some willingness to organize; supports efforts when prompted but lacks consistent initiative.	Leadership is reluctant or resistant to organizing activities; minimal support or engagement in growth efforts.

Local Planning Toolkit

JULY 2022

1. Our Local Union Strength
2. Checklist for a Well-Organized Worksite
3. Sample Agenda: Local Planning Meeting

This toolkit contains documents to help your local conduct a strategic planning meeting. The worksheets, Our Local Union Strength and Checklist for a Well-Organized Worksite, can be used to develop a plan that emphasizes organizing goals and activities that strengthen site-based outreach to bargaining unit members. A Sample Local Planning Agenda is also included to jumpstart preparation for a successful meeting. Check out cta.org/orgplan for more information on the CTA grants available to support a local planning process.



1 | Our Local Union Strength

Increasing our capacity and power to win for our members, students, and communities

Discuss the status of these union building blocks in your chapter. Note those already in place and strong. Note where strength is emerging and where there is room to get stronger. Use the worksheet on the last page to make a union-building plan for your chapter.

	Strong Local Union	Emerging Strength	Room to Get Stronger
ORGANIZED & INVOLVED MEMBERSHIP			
Membership	At least 98% membership.	At least 80% membership.	< 75% membership
Worksite Leaders	1:10 — A respected, trained, and active leader at each worksite for every 10 bargaining unit members. Site leaders talk with all members in their area on a regular basis to share updates, hear concerns, solicit ideas, and involve colleagues in union activities. Site Reps regularly attend Rep Council meetings.	1:20 — A respected, trained, and active leader for every 20 bargaining unit members. Some sites remain without active leaders. Varying degrees of member outreach; not systematic. Usually, one-way communication and a reliance on emails. Rep Council attendance varies.	1:30 or fewer. Few active site leaders. Many sites with no active leaders. Limited networks. No member outreach program, other than the occasional email. No functioning Rep Council.
Leadership Opportunities & Training	All site reps and other site leaders, officers, executive board, organizing team, and bargaining team members are highly trained in union organizing and in the specific skills for their role. Local training aligns with strategic plan. Leaders use campaigns to surface and recruit newly identified leaders. Diverse conference participation.	Some trained leaders. A few leaders have completed organizing training. Training topics vary and aren't always aligned with strategic plan. Limited training on how to identify and recruit more leaders and members to be active in our union. Limited opportunities for new leaders to play leadership roles in the work of building the local.	Very limited training opportunities. The same leaders do all the work of our local union. Same delegation attends conferences each year. Organizing is a new skill set for most of our union's leaders.
New Members	Robust, year-round program to ask each new employee to join the union and participate. Inspiring, positive new hire orientation presentation. Site leaders welcome all new employees. Forms processed efficiently.	Transactional message used at new hire orientation. Occasional site follow-up during the year, but not systematic. Form processing varies.	No membership recruitment program. District presents and collects forms. Forms processed slowly.
Member Participation	Members are proud to be union members and participating in achieving our local's vision for public education. A supermajority of members is active in union events, meetings, and actions. Our union is visible at every worksite.	A significant number of members are active in union events, meetings, and actions. Some union visibility in the workplace during big events but it varies from site to site. Member activism is viewed as a temporary necessity; not ongoing involvement to build a stronger local union.	Limited to no member participation. Low attendance at union meetings. Little union visibility at worksites. The morale is very low because of fear, futility, or division, or members are waiting for local's leadership to fix their concerns.

	Strong Local Union	Emerging Strength	Room to Get Stronger
COLLECTIVE BARGAINING & SITE ADVOCACY			
Collective Bargaining	Our union uses bargaining as an opportunity to build and strengthen our union by soliciting member input, keeping members well informed throughout each step of the bargaining process, and always activating significant numbers of members to win a great contract. The bargaining team is diverse, widely representative of our bargaining unit, and trained. Our bargaining campaign strengthens our community partnerships for public education. We win on big issues members and community care about.	Some member outreach and participation in contract campaign actions. Small, somewhat representative team. Some team members have at-the-table bargaining training, fewer with organizing and contract campaign training. Limited proposals on educator working conditions and student learning conditions. Members are given basic bargaining updates.	Collective bargaining program focuses mainly on the at-the-table component, except in times of crisis. Very limited information is shared with members. Bargaining team isn't diverse nor widely representative of our bargaining unit. Training level varies. The bargaining process is viewed as secretive or confidential.
Worksite Issues & Contract Enforcement	Site leaders involve members to act together to address issues that are important to people and to enforce the contract.	Some site leaders involve members to address site concerns and enforce the contract.	Contract enforcement doesn't involve members and relies mainly on grievances and the Grievance Chair/Officers or union staff.
COMMUNICATIONS			
1:1 Conversations	A systematic, member-to-member, two-way worksite communications network is established so that information can quickly be shared via conversations to/from our union's site leadership.	Union conversations happen in some worksites more than others but may not reach every bargaining unit member. Some attempts at two-way communication, but mostly goes from leadership to our membership.	1:1 conversations are haphazard or may not yet happen at all. We rely on emails as primary method of communication. Communication is one-way.
Membership Meetings 1:1 Conversations	Union site meetings held at all worksites with supermajority participation. General membership meetings are well attended. Meetings solicit members' ideas, advance union goals, further action plans, build unity, and increase union involvement.	Some union site meetings held with strong participation. General membership meetings have solid attendance. Some meetings don't have a clear outcome or fall into a rut of one-way communication. Meetings often convened just for crisis times.	Only general membership meetings; no site meetings. Low turnout except in crisis situations.
Print & Digital	Union news is regularly distributed to every member via leaflets, email, social media, and website. Analytics used to improve online and offline engagement. Our message is student-centered, clear, consistent, builds unity, and inspires action. Union posters, stickers, bulletin boards, and materials boost visibility.	Basic communication and visibility materials exist, but don't reach every member or every worksite. Our website and social media are current. We don't review analytics. Our message is inconsistent and isn't as compelling for our members and community as it could be.	Flow and reach of union information is limited. Website isn't kept up to date. Social media reach is low. We aren't using an email system that provides analytics. We don't have union posters, bulletin boards, or other materials.

	Strong Local Union	Emerging Strength	Room to Get Stronger
POLITICS & POLICY			
Elected Officials	A clear, transparent process for local candidate endorsement is used. Majority of our district board members were union-endorsed candidates. Our union regularly meets with and builds relationships with local elected officials. We hold them accountable to our vision for public education.	No local endorsement policy adopted but union does endorse occasionally. Our local union has some contact with local elected officials, but it's not consistent. We tend to reach out to local elected officials only in a crisis situation.	No endorsement policy. Local union does not usually endorse in any race. Weak to non-existent relationship with local elected officials.
Political Organizing	We have a funded PAC. Many members volunteer during elections. Many members participate in union advocacy activities that let elected officials know our position on important issues related to our students, members, and public education.	PAC established; not fully funded. Some members volunteer during elections. Community coalition work varies. Many members don't see our political organizing work as a key part of our strategy to build power and capacity to win for members, students, and our communities.	No PAC. Very limited volunteer participation during elections. Few members participate in policy advocacy efforts. High member frustration at unaccountable elected officials who don't support our union's bargaining effort for public education.
Vision for Public Education	We work in coalition with parents, other unions, and local community groups to organize for public education, workers' rights, and other issues that our community cares about. Bargaining is used as vehicle to advocate and achieve the public education all students deserve .	Some participation in community coalitions. We have built a few relationships with community groups and other unions, but usually in a crisis situation when we need parent and community support.	Limited relationships with community groups and other unions. Little to no participation in community coalitions.
PUTTING IT INTO ACTION			
Focused Resources	A written local plan is in place and is regularly discussed at every leadership meeting. Our time and financial resources are aligned with the plan.	Some general plan ideas and a calendar guide the union's work. Time and budget aren't always aligned with plan.	No strategic plan nor aligned budget. Time spent more on reacting to situations and putting out fires than on implementing a proactive plan.
Bargaining Unit List & Charts	An accurate and complete list of bargaining unit members with worksite, non-work contact information, membership, and union participation information is maintained and used. Data system is regularly updated. Lists/charts are routinely used for member outreach and organizing, including to track outreach and campaign progress.	Basic list exists but is incomplete and out of date in some places. Lists not regularly used for outreach. Member participation inconsistently tracked.	No accurate and complete list of bargaining unit members. Data not used to inform member outreach and organizing.
Team Coordination	Many leaders share in the work with clear responsibilities and a designated Point Person for each area and aligned with the strategic plan. Things stay well-coordinated across the union's work. Unified team. Opportunities for new leaders to play active roles.	Programs are generally well executed but not without some cumbersome challenges. Responsibilities not always clear. Implementation can be slow. Division may impact our effectiveness. Mixed level of involvement from team.	There are many good ideas, but many are never executed. Lack of shared purpose and shared action plan. Union's work dependent on just a few people.

Our Plan: Building Union Strength

Now that you've had a chance to assess which building blocks of union strength are in place and where there is room to grow, it's time to put together a plan for the coming year.

1. Areas of Strength: Which building blocks of union strength are already in place?

- | | |
|--|--|
| ☐ Membership | ☐ 1:1 Conversations |
| ☐ Worksite Leaders | ☐ Membership Meetings |
| ☐ Leadership Opportunities & Training | ☐ Print & Digital Communications |
| ☐ New Members | ☐ Political Organizing |
| ☐ Member Participation | ☐ Vision for Public Education |
| ☐ Collective Bargaining | ☐ Bargaining Unit List |
| ☐ Worksite Issues & Contract Enforcement | |

2. Priorities to Strengthen: Which one to three building blocks are most important to strengthen this year? Why?

Check one to three priority areas:

- | | |
|--|--|
| ☐ Membership | ☐ 1:1 Conversations |
| ☐ Worksite Leaders | ☐ Membership Meetings |
| ☐ Leadership Opportunities & Training | ☐ Print & Digital Communications |
| ☐ New Members | ☐ Political Organizing |
| ☐ Member Participation | ☐ Vision for Public Education |
| ☐ Collective Bargaining | ☐ Bargaining Unit List |
| ☐ Worksite Issues & Contract Enforcement | |

3. Plan to Strengthen Our Union:

PRIORITY AREAS	GOALS	ACTION STEPS	POINT PERSON	OTHERS	TIMELINE
<i>From the list above</i>	<i>What goal would be meaningful and measurable?</i>	<i>What will we do to strengthen this area?</i>	<i>Who will drive this effort forward and help us stay on track?</i>	<i>Who will help the Point Person get the work done?</i>	<i>By when does each step need to happen?</i>
1.					
2.					
3.					

2 Checklist for a Well-Organized Worksite

Discuss the status of these union building blocks at your site or in your department. Note the building blocks that are already in place. Discuss the top three areas that would most benefit from a focused plan. Use the worksheet on the next page to make a union-building plan for your site.

☐ Membership	At least 98% of the bargaining unit has joined our union.
☐ Worksite Leaders	There is a respected, trained, and active worksite leader for every ten bargaining unit members. Our site reps attend union-wide Rep Council meetings.
☐ Leadership Opportunities & Training	Worksite leaders and members attend trainings to build union knowledge and organizing skills. We use each campaign to recruit new leaders to join with seasoned leaders. There are many opportunities to take responsibilities for building our union.
☐ New Members	Worksite leaders personally welcome each newly hired colleague as soon as they start. We share our vision for public education, ask them to join our union, and provide regular updates so that new people can easily get involved.
☐ Member Participation	At least 80% of members at our site participate in union activities, actions, and events. Members view themselves as the union. Our union is always visible at our site with members proud to participate in achieving our local's vision for public education.
☐ Collective Bargaining	Our site understands this is an opportunity to build our union and achieve our vision for public education. A supermajority of members at our site participate to win a great contract.
☐ Worksite Issues & Contract Enforcement	Worksite leaders organize members to take action together to address issues on the job that are important to people and to enforce the contract. Grievances are handled in a timely way. Effective resolutions are reached.
☐ 1:1 Conversations	Worksite leaders regularly talk with everyone to learn what issues are important, solicit ideas, share information, involve others, and motivate members to take action. A member-to-member network is in place to get information out quickly.
☐ Membership Meetings	Union meetings are action-oriented and held at our worksite with at least 75% participation. Our site meetings are another way we facilitate two-way communication.
☐ Print & Digital Communications	Union leaflets are routinely distributed. The union bulletin board is up-to-date. We have union posters up. Members at our site follow our union on social media and we have their non-work email. Our message is student-centered, consistent, builds support, and inspires action.
☐ Political Organizing	Our site supports our vision of public education and understands our union's local political organizing program. Many members voluntarily donate to our political action fund, volunteer during elections, and vote. Many members participate in union activities that let elected officials know our perspective on important policy issues.
☐ Vision for Public Education	Worksite leaders participate in the school site council and other educator-parent committees. We have relationships with parents, members of other unions at our site, and other organizations as part of our union's community coalition work to achieve the schools our students deserve.
☐ Bargaining Unit List	There is an accurate list with non-work contact information, membership status, and participation information for all bargaining unit members. At least one worksite leader is trained in and uses our data system to support our organizing progress.

Our Plan: Building Union Strength at Our Site

Now that you've had a chance to assess which building blocks of union strength are in place at your worksite and where there is room to grow, it's time to put together a plan for the coming year.

1. **Areas of Strength:** Which building blocks of union strength are already in place?
- ☐ Membership

☐ Worksite Leaders

☐ Leadership Opportunities & Training

☐ New Members

☐ Member Participation

☐ Collective Bargaining

☐ Worksite Issues & Contract Enforcement

☐ 1:1 Conversations

☐ Membership Meetings

☐ Print & Digital Communications

☐ Political Organizing

☐ Vision for Public Education

☐ Bargaining Unit List
2. **Priorities to Strengthen:** Which one to three building blocks are most important to strengthen this year? Why?
- Check one to three priority areas:
- ☐ Membership

☐ Worksite Leaders

☐ Leadership Opportunities & Training

☐ New Members

☐ Member Participation

☐ Collective Bargaining

☐ Worksite Issues & Contract Enforcement

☐ 1:1 Conversations

☐ Membership Meetings

☐ Print & Digital Communications

☐ Political Organizing

☐ Vision for Public Education

☐ Bargaining Unit List

3. **Plan to Strengthen Our Union:**

PRIORITY AREAS	GOALS	ACTION STEPS	POINT PERSON	OTHERS	TIMELINE
From the list above	What goal would be meaningful and measurable?	What will we do to strengthen this area?	Who will drive this effort forward and help us stay on track?	Who will help the Point Person get the work done?	By when does each step need to happen?
1.					
2.					
3.					

SAMPLE AGENDA

3 Local Planning Meeting



Approximately 5–7 Hours

Facilitation Agenda for Meeting Leader

Welcome, Introductions & Agenda Review (15–30 MINS)

- Do a round of introductions
- Review the meeting objectives and agenda
- Establish meeting norms/ground rules
- Do a short ice breaker to lift the energy and set a positive mood.

Headwinds & Tailwinds: Activity & Discussion (40–60 MINS)

This activity can be conducted in wall stations, small group table discussions, or virtually using a notetaking tool like Jamboard and virtual breakout rooms. This activity provides a time to discuss big picture issues and the broader landscape of our union's work in the coming year.

In small groups, participants discuss three questions:

- 1 **Headwinds:** What forces today are acting against public education, workers' rights, and the education profession – locally, in our state, and nationally?
- 2 **Tailwinds:** What's helping today to build a successful movement for public education, workers' rights, and the education profession – locally, in our state, and nationally?
- 3 **Making It Happen:** Based on the discussion about Headwinds & Tailwinds, what are important issues to consider and areas to focus on in the coming year?

Report back from small groups noting common themes and unique points.

Stretch Break (5–15 MINS)

Lead a short energizer or give people a short break.

Assessment: Local Union Strength (60–75 MINS)

This segment provides an opportunity to build a shared understanding of objective measures of local union strength, assess where we are right now, and identify priority areas to strengthen.

- Review as a large group the handout: **Our Local Union Strength**. (If you are doing this activity with Site Reps, use the handout: **Checklist for a Well-Organized Worksites**.)



MEETING OBJECTIVES

By the end of this planning retreat, we aim to have:

- A common understanding of the indicators of a strong chapter so that we can develop a plan that strengthens our ability to win for members, students, and community.
- A written plan for the coming school year that results in a stronger union with increased participation. The plan will seize existing opportunities and will include goals, activities, timelines, and responsibilities.

MATERIALS NEEDED

- ☐ Handout: **Our Local Union Strength**
- ☐ Handout: **Checklist for a Well-Organized Worksites**
- ☐ Calendar of existing key union and district dates
- ☐ Chart paper, markers, tape (or virtual method for group notetaking)

(continued)

- In small groups, ask people to discuss the handout relative to our local union (or worksite). Ask groups to prioritize the areas of current strength and areas to strengthen. Rank the top three. Small groups should be prepared to explain why they chose these areas.
- Report back. **Aim to reach consensus on the top three priorities for the coming year.**

Break (30–60 MINS) Take a break, as needed.

The Calendar (30–60 MINS)

This segment provides an opportunity to review meetings, events, and key periods already on the calendar in order to identify existing opportunities to maximize for the year's plan. Make sure to set dates for important chapter meetings, events, and activities if not yet scheduled.

- Before the retreat, pre-chart or prepare a handout with existing dates. Consider using different colors so that it's easy to differentiate the type of meeting or activity it is.
- **Include dates/time periods for things like:** bargaining sessions, anticipated phases of the collective bargaining campaign, union executive board meetings, site rep meetings, general membership meetings, union site meetings, district board meetings, district semester start/end dates, district holidays and breaks, election dates, and other union, district, and community dates.
- Review the calendar of existing dates with the group. If you haven't yet set meeting dates for union meetings – like executive board, site rep, or membership meetings – add some time to do that during the retreat. As you develop the written plan, use this calendar as a reference point.
- **Look for opportunities:** Are there existing meetings or events that can be used as an opportunity for member outreach and turnout? Are there dates that are best suited for a union membership drive? Are there dates to avoid? What might be good time periods for site visits, 1:1 conversations, and site meetings?

Making Our Plan & Putting it Into Action (60–120 MINS)

This segment provides time for the group to develop a plan, including goals, concrete actions, timelines, and responsibilities.

- Look at the **top three priority areas** to strengthen from the earlier discussion. Solicit the group's ideas for goals, action steps, who will be the point person, who else is needed to get things done, and the timeline. Allow everyone to share their perspectives.
- Then, begin to narrow in and reach agreements on **specific goals, actions steps, responsibilities, and timeline**. Test for consensus. Note on a flipchart or group notetaking platform when decisions have been made.
- Make sure each activity that you decide on has a timeline and make sure that each activity has a point person to coordinate the work as well as other people who will help out. Write names down. Track who will do what by when so that there is a collective plan.

Wrap Up and Next Steps (15–30 MINS)

- Summarize decisions and next steps. Make sure to write these down.
- **Determine the process for tracking progress and checking in on the plan.** At the very least, there should be reports about the plan at each Executive Board meeting.
- Evaluate today's planning meeting.

Adjourn

End with an inspiring send off!

LOCAL ASSOCIATION BUILDING REP/WORKSITE STRUCTURE ASSESSMENT



Expectation of AR/BR*	Foundational	Power-Building	Agenda-Driving
Utilizes effective communication to be the local voice/face of the union at the worksite.	Has a list of members. Hosts union leaders/staff when they schedule site visits. Provides members with contact information for union leadership/staff for questions/issues that come up. Has flyers and pamphlets from union for those who ask. Participates in local union meetings/building rep meetings.	Maintains a list of members and their emails and phone numbers. Arranges site visits from union leaders/staff. Places flyers and pamphlets from union in mailboxes. Shares information with members only. Communicates with union leadership/staff about worksite issues when they arise. Plans a monthly 10-minute meeting to share information from local union/building rep meetings.	Has all personal emails of members in email group. Has all cell phone numbers of members in text group. Utilizes monthly 10-minute meeting to communicate local agenda and promote engagement/activism. Maintains 2-way communication with members and union leadership/staff. Regularly shares BRAG with PMs, New Members, and Existing Members. Uses various means of communication to connect with members. Maintains an up-to-date list of all worksite employees eligible for union membership (potential, new, and existing members). Informs union leadership/staff about worksite issues and plans.
Engages new and existing members and identifies and recruits potential new leaders/advocates.	Places new member packets in mailboxes. Hosts union leadership/staff for yearly membership meeting. Maintains union bulletin board where allowed. Shares names of potential new leaders with union leadership/staff.	Delivers new member packets to new members. Holds membership meetings when needed (with or without support of union leadership/staff). Shares invites and notices for local union engagement opportunities such as classes, socials, etc. Recruits potential leaders to take action for the union.	Visits all new employees (including new employees and recently joined new members) within a few days of hire with welcome packet for 1:1 or holds a "New Member Orientation" for new members at the worksite. Uses 1:1 data, YRO cards, surveys, etc. to invite new members to participate in worksite committees (social, advocacy, etc.). Personally shares engagement opportunities from the union with new members (classes, socials, etc.) based on 1:1 and YRO data. Plans "get-to-know-you" social events for union members. Builds diverse leadership structure throughout the building, consistently recruiting and training new leaders.
Ensures that all potential members (PMs) are invited to join the union and are informed of the union's work.	Provides PMs with membership materials. Is visible and available to answer questions regarding membership. Less than 25% worksite density.	Has 1:1 conversations with most PMs. Has a list of PMs with notes about conversations. Makes follow-up contacts with PMs that expressed interest in joining. Identifies leaders respected by PMs and engages those leaders in recruiting PMs. Between 25% and 50% worksite density.	Holds worksite PM meeting and scheduled 1:1 conversations with each PM. Has relationship map of worksite with potential members coded and assessed. Maintains a list of PM contact information through YRO cards, etc. Speaks regularly with or arranges for others to speak with potential members for BRAG. Makes multiple follow-up contacts with PMs. More than 50% worksite density.
Models proactive behaviors and acts as an advocate for educators and builds capacity in others to do the same.	Refers members to union leadership or staff for problems. Is visible and available to hear member issues and concerns.	Meets with principal/supervisor when problems arise. Refers worksite issues to union leadership or staff for escalation, if needed. Engages other members to assist with collecting info regarding worksite issues.	Creates a team that meets regularly with principal/supervisor for proactive problem-solving. Works with members to problem-solve for worksite issues and escalates when necessary. Uses worksite issues as an opportunity to organize and build solidarity at the building level. Uses a distributive leadership model to engage multiple members in the work of the local. Uses a distributive leadership model to recruit and identify new leaders.

*Association Rep (AR) and Building Rep (BR) are used interchangeably throughout this document.