

High Participation Local Self-Assessment Tool

Rating Scale

- 1: Servicing Participation
- 2: Emerging Participation
- 3: Growing Participation
- 4: High Participation Local

1. School Site Leaders & Contract Action Teams

How empowered and organized are school site member leaders and teams?

1 (Servicing): Site leaders primarily relay information; equity and member access are not considered.	2 (Emerging): Site leaders occasionally assist with workplace concerns and begin recognizing participation gaps across underrepresented groups.	3 (Growing): Site leaders/CATs organize members, handle Level 1 grievances locally, build 10:1 communication networks, and intentionally recruit leaders from diverse job titles, classifications, and backgrounds.	4 (High): Site leaders confidently handle Level 1 concerns locally, manage active 1:10 CATs/Organizing Squads, and run building councils. Equity is embedded in leadership identification, ensuring rank-and-file teams reflect the full diversity of campus staff.

2. The Union Staff Role - Who owns the work—the staff or the members?

1 (Servicing): Staff act as primary problem-solvers, handling individual grievances, organizing, and communications. Servicing and equity considerations are absent.	2 (Emerging): Staff begin involving member leaders in union work; training occurs occasionally with growing awareness of representational equity gaps.	3 (Growing): Staff regularly coach worksite leaders and support member-led campaigns, structurally separating individual representational servicing from field organizing.	4 (High): Staff function primarily as strategic coaches, capacity builders, and organizers. Staff train members to resolve Level 1 issues, analyze data through an equity lens, and build sustainable, member-driven systems across all job classifications.

3. Valley Work (Non-Bargaining Lulls)

How does the local stay active and build power during non-bargaining periods?

1 (Servicing): Union activity completely pauses between contracts; no ongoing workplace organizing or community connection exists.	2 (Emerging): Local occasionally offers workshops or events during lulls, with initial attempts to engage broader member groups.	3 (Growing): Local organizes around local site fights, contract enforcement, and continuous skill-building workshops during lulls while building relationships with community partners.	4 (High): Off-contract lulls are intentionally leveraged for site-level enforcement, needs assessments, continuous mobile training, and permanent, non-transactional community-labor alliances (e.g., racial, social, and economic justice partnerships).

4. Collective Bargaining in High-Participation Locals

How is collective bargaining structured and executed?

1 (Servicing): Bargaining is closed-door, secret, and handled by third parties or small isolated committees with strict ground rules.	2 (Emerging): Local shares occasional bargaining updates and surveys members on contract priorities.	3 (Growing): Local expands bargaining teams, uses plain-language proposals, and conducts site-level briefings to build member awareness.	4 (High): Bargaining is treated as an active organizing campaign with open, massive, representative bargaining teams (reflecting all job classifications/backgrounds), radical transparency, and community-centered "common good" demands.

5. Being a President of a High-Participation Local

How does the local president lead and distribute organizational power?

1 (Servicing): President acts as an administrative crisis manager, top-down decision-maker, and primary grievance handler.	2 (Emerging): President encourages participation but retains primary operational and political responsibilities.	3 (Growing): President guards the strategic plan, coordinates leadership teams, and reallocates resources toward organizing and member capacity.	4 (High): President focuses on strategic coordination, political diplomacy, geographic turf organizing, and budget reallocation. They actively delegate power, guard the strategic plan ("if it's not on the plan, it's not happening"), and foster a "choir model" of shared leadership pacing to prevent burnout.

6. How High-Participation Locals Use Data to Build Power

How are data systems utilized across the local?

1 (Servicing): Data management is purely administrative and passive (dues tracking, static lists).	2 (Emerging): Data is occasionally reviewed after campaigns to evaluate turnout.	3 (Growing): Data informs organizing decisions; site leaders begin tracking meeting attendance and petition signers.	4 (High): Data management is decentralized and active. Leaders analyze digital wall-charts (Action Builder/OrgDB) and run quantitative structure tests (e.g., physical paper petitions) as "gates" to evaluate supermajority campaign readiness and address engagement gaps across diverse subgroups.

7. How High-Participation Locals Train Their Members

How does the local build rank-and-file organizing capacity?

1 (Servicing): Training is non-existent, top-down, or limited to reading static policy documents.	2 (Emerging): Occasional ad-hoc trainings are offered for newly elected building reps.	3 (Growing): Local offers structured skill workshops (e.g., 1:1 conversations, charting) and reduces barriers through accessible meeting times.	4 (High): Local operates active, multi-tiered training pipelines (e.g., Summer Institutes, Member Organizer cohorts, "Skills to Win") using a "gradual release" model (from staff modeling to autonomous member execution) with mobile, on-site, and rotational workshops.

8. Overcoming "Respectability Politics" and the Fear of Conflict

How does the local navigate workplace conflict and authority?

1 (Servicing): Local relies on "respectability politics," assuming polite, closed-door labor-management meetings resolve disputes.	2 (Emerging): Growing awareness that quiet meetings yield limited results, but leaders hesitate to organize visible collective pressure.	3 (Growing): Worksite leaders occasionally organize collective site actions (e.g., petition deliveries, wear-red days) to enforce contract rights.	4 (High): Local actively rejects respectability traps and "moral victories," focusing on concrete demands backed by collective leverage. 1:10 CAT networks transform isolated fear into collective confidence and protected solidarity.

9. Defensive Organizing & Anti-Authoritarian Protection

How does the local respond to political, civil rights, and community threats?

1 (Servicing): Union does not respond to community or political crises outside standard contractual scope.	2 (Emerging): Local issues statements or attends community rallies during major political or civil rights crises.	3 (Growing): Local coordinate with community organizations on specific defense efforts (e.g., voter education, student safety).	4 (High): Local repurposes its site-level communication trees and strike infrastructure for rapid-response community defense (e.g., protecting immigrant families/ICE defense, supporting LGBTQ+ youth, and election protection).

10. The Strategic Plan—Guarding the Roadmap and Building Coherence

How does the local align its vision and prevent reactive firefighting?

1 (Servicing): Planning is non-existent; local operates in continuous reactive firefighting mode.	2 (Emerging): Annual goals exist but are regularly set aside when daily operational crises occur.	3 (Growing): A strategic plan guides major campaign cycles and budget allocations.	4 (High): A co-created, democratized strategic plan (distilled into a clear roadmap) drives all operations. The local distinguishes structure-building from issue campaigns, aligns annual launches around the roadmap, and systematically executes program-driven worksite visits.

11. Methodical Structure Tests—Measuring Member Readiness

How does the local evaluate member leverage before escalating campaigns?

1 (Servicing): Local relies on guesswork or assumptions, jumping into escalations without testing member readiness.	2 (Emerging): Local tracks basic participation metrics (e.g., online survey response counts).	3 (Growing): Local uses simple structure tests (e.g., button days, wear-red days) to gauge member engagement before major events.	4 (High): Local deploys an escalating sequence of quantifiable structure tests (e.g., 1:1 signed platform pledges, sticker days, strike vote pledges) with strict majoritarian thresholds (70–80%+ active participation) acting as mathematical "gates" to confirm supermajority readiness.
Total of All Dimensions			

Calculating Total Score & Organizational Readiness Level

Sum the agreed consensus scores across all 11 categories (Maximum Total Score: 44 Points). Match the total score to the corresponding Organizational Tier:

Score Range	Organizational Tier	Dominant Model	Strategic Priority
11 – 18	Tier 1: Servicing Local	Reactive / Third-Party Servicing	Rebuild steward/Member networks; basic 1:1 training.
19 – 27	Tier 2: Emerging Local	Transitioning / Hybrid Model	Implement wall-charts; launch basic structure tests.
28 – 36	Tier 3: Growing Local	Organizing / Member-Driven	Decentralize training; build rapid community defense.
37 – 44	Tier 4: High Participation Local	Supermajority Power Engine	Sustain choir pacing; guard strategic roadmap.