



High Participation Local Scenarios



Campaign Coaches will use these scenarios to enhance their coaching skills and better support campaign leads.

Scenario: The Higher Education Workers Alliance

The Higher Education Workers Alliance (HEWA) represents approximately 1,100 classified staff employees across three public colleges in a state university system. Members include administrative assistants, facilities staff, maintenance employees, IT professionals, clerical workers, library staff, food service employees, and custodians.

For many years, the union's primary focus was bargaining and grievance representation. Most union activities were directed by the president, vice president, a staff organizer, and a small executive board. Members generally supported the union, but participation was inconsistent. Membership density hovered around 70 percent, and many members only interacted with the union when they experienced a workplace problem or contract dispute.

Five years ago, the state university system began discussing a workforce modernization plan that many members feared would increase outsourcing, reduce job security, and worsen compensation disparities between campuses. During a series of meetings, activists discovered that employees doing similar jobs were paid significantly different wages depending on which campus employed them. Members also learned that advancement opportunities, training access, and classification systems varied greatly across the system.

A small group of activists proposed a statewide campaign focused on compensation equity, professional advancement, and employee retention. Rather than limiting the effort to one campus, they invited neighboring locals and other labor organizations to join the discussion.

The coalition eventually included unions affiliated with several labor organizations. Each participating local agreed to send representatives to a coalition council that met monthly. After two years of relationship-building, the coalition adopted a shared vision focused on compensation reform, fair classification systems, and improved professional development opportunities.

Today, the coalition is widely recognized as one of the strongest labor alliances in the state's higher education system. Coalition leaders regularly share research, bargaining information, and campaign updates. When one local faces a contract fight, members from other locals frequently attend rallies and informational pickets to demonstrate solidarity. Community groups focused on economic justice, workforce development, and public education have also begun supporting the coalition's efforts.

Internally, HEWA has changed significantly.

The local created member-led committees responsible for research, communications, political engagement, data analysis, membership outreach, and coalition coordination. Many of these committees are chaired by rank-and-file members rather than officers. Some committee leaders had never held a union role before volunteering for campaign work.

One long-time maintenance employee who had never attended a union meeting now leads the compensation research committee. An IT specialist manages campaign databases and participation tracking systems. A newer employee leads a membership outreach team that regularly contacts coworkers, gathers feedback, and recruits volunteers.

As part of the campaign, HEWA invested in new organizing practices. Committee leaders track participation rates, meeting attendance, leadership development activities, petition signatures, volunteer engagement, and organizing conversations. Reports are reviewed monthly by officers, staff, and committee leaders. Data is often used when deciding where to invest resources or which departments may need additional leadership development.

However, participation remains uneven across campuses.

The flagship campus regularly turns out large numbers of members for meetings and actions. Participation on one rural campus is far lower. Leaders believe this is partly because many members work second or third jobs and have limited availability. Another campus struggles to engage night-shift custodians and facilities employees who work outside traditional meeting schedules.

To address these challenges, the local has experimented with virtual meetings, multilingual communications, rotating meeting times, and department-based outreach teams. Participation has improved somewhat but leaders continue to debate whether these efforts are sufficient.

Membership density has increased dramatically over the past three years and now exceeds 90 percent. Participation in actions has increased as well. During a recent system-wide petition campaign, approximately 75 percent of members signed petitions supporting compensation reform. More than 300 members attended a statewide virtual town hall, the largest member meeting in local history.

Still, leaders recognize that signing a petition and attending a town hall are not the same as sustained leadership involvement. A relatively small group of activists continue to perform much of the campaign's day-to-day work. Although new leaders have emerged, some committees struggle with burnout and uneven workloads.

The role of staff has also changed.

Historically, staff handled most grievances, communications, member training, and organizing activities. Today, staff spend much of their time coaching committee leaders, facilitating trainings, supporting campaign strategy, and helping members navigate workplace issues. Staff still manage complex grievances and legal matters, but they increasingly encourage members to solve problems collectively rather than relying on staff intervention.

Some members welcome this approach and appreciate developing new skills. Others express frustration, arguing that they pay dues because they expect union staff to handle workplace problems for them.

The local's executive board has also been evolving. Officers no longer run every campaign meeting. Instead, committees are expected to develop plans, make recommendations, and carry out approved work. The executive board focuses more heavily on strategic planning, coalition relationships, political advocacy, and long-term campaign goals.

Yet board members disagree about how quickly leadership should be distributed. Some believe committees should have greater decision-making authority. Others worry that newer leaders may lack the experience necessary to make strategic choices about bargaining and political action.

Finances have become another point of discussion.

Over the past four years, the local has redirected money away from conferences and governance activities and into leadership training, organizing technology, campaign materials, member communications, interpretation services, and coalition-building efforts. Supporters argue the investments are creating long-term organizing capacity. Critics contend the local has cut too deeply into traditional programs and member benefits.

The union has intentionally attempted to diversify leadership. Recent committee recruitment efforts focused on younger workers, employees of color, women in maintenance trades, multilingual members, and employees from smaller campuses.

Progress has been made. Several committees are more representative than they were five years ago, and leadership opportunities are more accessible. However, coalition leaders recently reviewed participation data and discovered that employees from the smallest campus rarely hold leadership positions. Members whose first language is not English participate at lower rates than other groups despite translated communications.

The coalition's flagship campaign is entering a critical phase. Legislative allies have expressed interest in pursuing statewide compensation reform, and university leaders have

agreed to participate in discussions about classification systems and advancement structures.

The union must now decide whether its current structures are strong enough to support a multi-year statewide campaign requiring large-scale member engagement, worksite leadership, coalition coordination, organizing conversations, data analysis, and political mobilization.

Some members believe HEWA has already become a high-participation local. Others argue it is still transitioning from a service model and has significant work to do before leadership, participation, and power are truly distributed across the organization.

Discussion Questions

1. Using the High Participation Local Assessment Tool, score HEWA on all 13 dimensions.
2. Which categories are clearly strengths and which categories are debatable?
3. Where do you see evidence of distributed leadership? Where is leadership still concentrated?
4. How effectively is HEWA using organizing data to build power?
5. What evidence suggests the staff role is changing?
6. How strong are the coalition and community relationships?
7. What participation barriers remain unresolved?
8. Does membership density translate into meaningful member engagement?
9. How would you score the local on centering equity? Why?

Scenario: Building a Union Beyond Bargaining

The Capital Community College Educators Association (CCCEA) represents approximately 900 faculty, professional staff, and adjunct instructors across a large community college system. For many years, the union was viewed primarily as an organization that bargained contracts, handled grievances, and provided representation when members encountered workplace problems.

Most members believed in the union and appreciated contract protections, but participation was limited. General membership meetings often drew fewer than 20 people. Members frequently contacted union leaders when they needed assistance but rarely volunteered for union activities. Over time, much of the union's knowledge, relationships, and decision-making became concentrated in a handful of officers and long-serving activists. Leaders began worrying about what would happen when these individuals retired or stepped down.

Three years ago, several emerging leaders began discussing the long-term sustainability of the local. They believed the organization needed to become more than a bargaining and grievance machine. The union wanted members to see themselves as owners of the organization, not simply consumers of services.

The leadership team began by asking members what they wanted from their union. They conducted surveys, virtual listening sessions, in-person meetings, and informal conversations across departments. Members consistently reported wanting stronger communication, more transparency, better opportunities to connect with colleagues, and greater involvement in shaping the future of the union.

Based on that feedback, the union launched several new committees focused on communications, organizing, member engagement, and professional issues. Union leaders assumed members would eagerly participate.

They were wrong.

While members expressed interest, few actually joined the committees. Meetings were initially well attended, but participation steadily declined. Several committees eventually stopped meeting altogether. Leaders became frustrated because members regularly requested improved communication and engagement opportunities but rarely volunteered to help create them.

Rather than abandoning the effort, union leaders reflected on what they were learning. They concluded that simply creating committees was not enough. Members did not

become involved because a volunteer opportunity existed. People became involved because someone they trusted personally invited them to participate.

The local shifted toward a relationship-based organizing model.

Officers and activists began conducting one-on-one conversations with members. They identified respected coworkers, listened to workplace concerns, and made personal leadership asks rather than broad requests for volunteers. Leaders spent time asking members about their goals, challenges, and interests. Instead of saying, "We need volunteers," they began asking specific individuals to take on specific responsibilities.

This approach led to one of the union's most significant accomplishments: rebuilding its steward program.

For years, stewards had virtually disappeared from the organization. Members had no clear workplace contacts beyond officers and staff. Leaders worried that every grievance, question, and organizing challenge eventually landed on the same few people.

After months of direct outreach, the local recruited eight new stewards from different areas of the college. The union developed a steward training program covering contract knowledge, organizing conversations, grievance support, leadership development, and member outreach. Several participants had never held union positions before. The union hopes stewards will eventually provide office hours, support coworkers, identify workplace leaders, and help build organizing capacity throughout the institution.

At the same time, the local invested significant energy in communications.

A monthly newsletter evolved from a short two-page publication into a much larger communication tool featuring union updates, labor history, contract education, coalition news, and member stories. Members gradually began contributing articles and content. The local also started developing a yearly communications calendar and planning events further in advance than ever before.

The union also experimented with community-building events that had little to do with bargaining. Labor history programs, social gatherings, networking opportunities, and family-friendly activities became part of the union's strategy. Leaders believed stronger relationships between members would lead to stronger organizing over time. Attendance at these events varied significantly. Some were successful while others attracted only small groups of participants.

Despite progress, challenges remain.

The local's membership is highly fragmented. Nearly 85% of members are adjunct or part-time employees. Many work at multiple institutions, juggle family responsibilities, or hold second jobs. Even leaders who support the union acknowledge that many members have limited time and energy to participate in additional activities. This reality continues to limit participation in committees, campaigns, and events.

The union has also struggled to identify all potential leaders. For years, membership records were incomplete, and leaders often lacked a clear understanding of who their members were and where opportunities for engagement existed. The local has made progress collecting information, but leaders acknowledge that they still do not have a complete picture of workplace networks and informal leadership structures.

Relationships with other unions on campus are improving. The local regularly collaborates with faculty, professional staff, and facilities unions on communications and events. Leaders increasingly believe that many workplace issues require coalition-based solutions rather than single-union approaches. However, collaboration still depends heavily on a small group of committed activists who maintain those relationships.

The role of leadership is also changing. Officers are working intentionally to develop new leaders, distribute responsibilities, and create pathways for involvement. New positions have been added to support communications and membership engagement. Several newer members have stepped into leadership roles, including stewards, event organizers, and communications contributors. Yet major decisions still tend to flow through a relatively small leadership team.

The role of staff is less clear. Staff continue to handle many traditional union responsibilities, but officers increasingly want members and stewards to take ownership of organizing, communications, workplace support, and relationship building. The transition is underway, but not yet complete.

In recent months, the union has begun discussing a mutual aid program to help members facing financial hardship. Leaders have also identified the college Board of Trustees as an important audience and hope to encourage members to share stories about their work and impact on students. These efforts are intended to strengthen both internal solidarity and external relationships.

As the new academic year begins, union leaders believe they have made significant progress toward creating a more participatory organization. They point to the steward program, improved communications, new leadership pathways, and stronger relationships among members.

Others argue that participation remains concentrated in a relatively small group, that organizing systems are still developing, and that the culture of member ownership is far from fully established.

The executive board has decided to use the High Participation Assessment Tool to evaluate where the local currently stands and identify priorities for the next phase of growth.

Discussion Questions

1. Score the local on each of the 13 dimensions of the High Participation Assessment Tool.
2. Which categories are strongest? What evidence supports those ratings?
3. Which categories are weakest? Why?
4. Is leadership truly distributed, or is the local still dependent on a core group of activists?
5. How effective are the steward structures in building participation and power?
6. What role do organizing conversations play in this scenario?
7. How should the local improve its use of data and worksite mapping?
8. How would you score coalition and community power?
9. What barriers to participation still exist for adjunct and part-time members?

Scenario: Building Visibility, Trust, and Collective Action in Challenging Times

The Lakeshore Education Association (LEA) represents approximately 1,800 educators and education support professionals across a suburban school district. Historically, the union has been strongest when organizing around contract negotiations, salary concerns, and workload issues. Participation in bargaining-related campaigns is typically high, but member engagement outside bargaining cycles has been inconsistent.

In recent years, district leaders, educators, and families have struggled with growing concerns about student mental health, belonging, safety, and school climate. While many educators believe schools should intentionally create supportive environments for all students, the community has become increasingly polarized around issues of identity, inclusion, and student support services.

Several educators have experienced criticism on social media for comments perceived as political. School board meetings that once focused primarily on budgets and curriculum now frequently include heated public debate. Many staff members report feeling uncertain about what topics are safe to discuss publicly and worry that their professional reputation could be damaged by a single social media post or community complaint.

Against this backdrop, a small group of union activists began discussing how the local might help educators support students while navigating an increasingly divided community.

The effort started after several educators attended trainings focused on student wellness, mental health, and creating supportive school environments. Participants returned energized and began talking with colleagues about ways the union could encourage educators to be more visible sources of support for students who might be struggling.

Initially, the effort was led by only a handful of members. Most conversations occurred informally between trusted coworkers. Several activists designed materials promoting messages of belonging and student support and distributed them to interested educators. They were uncertain how staff members would respond.

To their surprise, educators from multiple schools expressed interest. Several teachers requested posters and classroom signs that communicated support for students. A few support professionals asked whether they could participate as well. Even some administrators quietly expressed appreciation for the effort and indicated they would support conversations about student wellness.

However, support was far from universal.

Many educators privately agreed with the goals but were reluctant to participate publicly. Some feared criticism from parents. Others worried that community members might misinterpret their intentions. Several members stated they agreed with the values behind the effort but did not want their names attached to anything visible.

As a result, a small number of activists continued doing most of the organizing work.

The union's executive board encouraged members to share stories about student needs and school climate concerns. Listening sessions were held both virtually and in person. Attendance varied. In some schools, meaningful conversations emerged about student mental health, suicide prevention, social isolation, and trusted adult relationships. In others, participation was minimal.

Through these conversations, the union identified a growing number of educators interested in serving as workplace contacts around student support issues. The union created a network of volunteers willing to connect colleagues with resources, share information about available programs, and help identify concerns emerging in their schools.

Some of these volunteers became highly active. They organized conversations among coworkers, encouraged participation in trainings, and helped distribute information. Others were supportive but remained largely passive, preferring to assist only when asked directly.

The union leadership team began discussing whether this informal network should become a more structured organizing effort.

To support the work, LEA developed partnerships with several community organizations focused on student wellness, youth mental health, family support services, and educational equity. These organizations provided resources, training opportunities, and advice on how to communicate effectively in a polarized environment.

The coalition relationships strengthened the campaign, but most members were only vaguely aware that they existed.

Internally, the union's communication systems expanded significantly. The local created a monthly newsletter, increased social media communication, and began highlighting stories from educators across the district. Open rates improved steadily, and members reported feeling more informed about union activities than they had in previous years.

At the same time, leadership recognized a major weakness.

The local had very little organizing data. Leaders knew who attended meetings and trainings, but they lacked detailed information about which worksites had strong participation, where informal leaders existed, or which members had been contacted through organizing conversations. Decisions were still largely based on anecdotal information rather than systematic analysis.

The budget reflected mixed priorities. The union continued investing significant resources in conferences, governance activities, and traditional operations. However, new funding was also being directed toward communications, training opportunities, coalition work, and member engagement activities. Some board members argued for greater investment in organizing infrastructure, while others wanted to maintain long-standing spending patterns.

The role of staff was also evolving.

Historically, members relied heavily on staff to solve problems and guide campaigns. In this emerging effort, staff encouraged members to take ownership of conversations, relationship-building, and outreach. Staff frequently coached activists and helped connect them with resources, but members still looked to staff for direction on many decisions.

Questions of equity surfaced throughout the campaign.

Leaders observed that participation was strongest among veteran educators and weakest among newer educators, education support professionals, and staff from several buildings serving lower-income communities. While the union frequently discussed inclusion and access, it had not yet systematically examined who participated, who held leadership positions, and what barriers might prevent broader engagement.

As the school year progressed, more educators became visible supporters of the effort. Several schools displayed supportive signage. More members attended trainings than ever before. New relationships were forming across buildings.

Yet many activists felt the campaign remained fragile.

Participation was growing, but a relatively small group continued to drive most activities. Coalition partners were engaged, but member understanding of those partnerships remained limited. Communication had improved dramatically, but organizing structures were uneven. Leaders were uncertain whether they had built a sustainable movement or simply a successful project driven by a few passionate individuals.

At the next leadership retreat, members are asked to use the High Participation Assessment Tool to assess the local's current capacity and determine what would be required to build a truly high-participation organization. The discussion is

expected to focus not only on what the local has accomplished, but also on the gaps that remain in leadership development, organizing structures, member engagement, worksite capacity, data use, equity, coalition power, and distributed ownership of the work.

Discussion Questions

1. How would you score the local on each of the 13 dimensions in the assessment tool?
2. Which categories are strongest? What evidence supports those ratings?
3. Which categories appear to be transitioning from a 2 to a 3?
4. Where is union work still concentrated among a small group of activists?
5. How effective are the local's communication systems compared to its organizing systems?
6. What additional worksite structures would need to be developed?
7. How well is the local using coalition partnerships and community power?
8. What organizing data is missing?
9. How effectively is the local centering equity and participation across different groups of members?

Scenario: Vision to Action? Assessing the River City Educators Association

The River City Educators Association (RCEA) represents approximately 5,500 educators in one of the largest school districts in the state. The local has a long history of successful bargaining, political advocacy, and member mobilization during contract fights. Membership density is high, and many educators identify strongly with the union.

However, following several years of rapid change in public education, the executive board began questioning whether the union's priorities still reflected the current needs of educators, students, and communities.

Many leaders noted that the local often reacted to crises instead of leading with a proactive vision. Meetings regularly focused on responding to district decisions, legislative attacks, staffing shortages, budget issues, or school board controversies. While members generally agreed about what they opposed, there was less clarity about what they were collectively trying to build.

Two years ago, the union launched a district-wide initiative called *"The Schools Our Students Deserve."* The goal was not to win a specific contract demand or legislative fight. Instead, the campaign aimed to create a shared vision that could guide organizing, bargaining, political action, coalition work, communications, and member engagement for years to come.

The leadership team created a steering committee composed of officers, building representatives, rank-and-file members, and several emerging leaders who had never previously held formal union positions. The committee organized listening sessions across the district and invited participation from educators, education support professionals, parents, community organizations, and leaders from other school employee unions.

Some members immediately embraced the process.

Others were skeptical.

During building visits, leaders heard questions such as:

"Why are we spending time on this when we have bargaining coming up?"

"Why are we inviting people outside the union into our conversations?"

"Shouldn't we be focusing on member issues instead of community issues?"

Several veteran activists worried that community voices might dilute member priorities. Newer members, however, often welcomed the opportunity to connect union concerns with broader issues affecting students and families.

Over eight months, the committee gathered hundreds of comments from forums, surveys, listening sessions, and stakeholder meetings. Participants were asked two central questions:

- What should excellent teaching and learning look like in our district?
- What should excellent working conditions look like for educators and school employees?

The steering committee reviewed the responses, identified common themes, and developed a new ten-point vision that described the schools, workplaces, and community partnerships members hoped to build. The vision was ultimately adopted by the executive board and celebrated as one of the most significant organizing projects the union had undertaken in years.

Since then, the vision has become part of many union activities.

Building representatives receive training on how to communicate the vision to members. Officers reference it during school board meetings. Bargaining teams use it when explaining proposals. Legislative activists incorporate it into discussions with elected officials. Communication materials often connect current union priorities to the larger vision.

Yet implementation has been uneven.

In some schools, building representatives regularly discuss the vision with members and connect workplace issues to long-term organizing goals. Members in these schools report feeling more informed about the union's purpose and priorities.

In other schools, members have only a vague understanding of the initiative. Some educators know the slogan but cannot explain the ten goals. Several building representatives admit they rarely use the framework because they feel overwhelmed by day-to-day member concerns.

The local's communications committee has invested heavily in promoting the vision. Newsletters, social media posts, board reports, workshops, candidate screenings, and advocacy campaigns increasingly use common language connected to the ten goals. Communication staff believe the union has never had a clearer message.

At the same time, some activists question whether improved messaging has translated into deeper organizing.

Participation in rallies and bargaining actions remains similar to previous years. The local can mobilize members when major issues arise, but involvement in ongoing organizing structures remains concentrated among a relatively small core of activists.

The executive board recently reviewed participation data and found substantial differences across worksites. Some schools consistently have strong representative systems, high meeting attendance, and active organizing teams. Other schools rely almost entirely on one building representative who acts as the sole communication channel between the union and members.

The role of coalition partners has expanded considerably. Community organizations, parent groups, civil rights organizations, and other labor unions contributed ideas during the visioning process and continue to collaborate with the union around public education issues. Many coalition partners feel a stronger sense of ownership and alignment with the union than ever before.

Still, member opinions are mixed.

Some members believe coalition work has strengthened the union's public credibility and community support.

Others argue that leaders spend too much time building external relationships and not enough time recruiting workplace leaders and strengthening internal organizing structures.

The local's finances reflect these competing priorities. Over the past two years, the union has increased spending on communications, community engagement, coalition work, leadership development, and advocacy campaigns. Traditional governance activities continue to receive substantial funding as well. Some leaders argue the budget should shift even more aggressively toward organizing infrastructure and worksite leader development.

The role of leaders is evolving.

Several executive board members have intentionally delegated responsibilities and recruited new activists into meaningful roles. New members have joined committees, facilitated listening sessions, participated in political advocacy, and taken leadership in communications projects.

One widely respected member who rarely seeks elected office emerged as a key architect of the visioning process. His skill in synthesizing ideas, building consensus, and drafting

language earned widespread admiration throughout the campaign and demonstrated that leadership can take many forms.

However, major strategic decisions still tend to flow through a relatively small group of officers and executive board members.

The staff role is similarly mixed. Staff support communications, bargaining, coalition relationships, leadership development, and campaign coordination. While staff increasingly encourage member leadership, many members still look to staff and officers to provide direction before taking action.

The union recently created a new Organizing and Advocacy Committee with the goal of expanding member engagement, supporting future campaigns, and strengthening connections between the vision and the everyday work of the union. Committee members are enthusiastic, but the group has not yet fully defined its responsibilities or long-term goals.

As the local enters a new round of school board elections, legislative advocacy, and salary negotiations, leaders are asking a difficult question:

Has the union truly become a high-participation organization, or has it simply developed a stronger message and vision while still depending on a relatively small group of people to carry most of the work?

The executive board has asked participants to use the High Participation Assessment Tool to assess the current state of the organization and identify what additional changes are needed to build a high-participation local.

Discussion Questions

1. How would you score the local on each of the 13 dimensions of the High Participation Assessment Tool?
2. Is the union's work broadly distributed, or does a small group still carry most responsibilities?
3. How effectively are building representatives using the shared vision to organize members?
4. Does the existence of a strong communications strategy indicate strong organizing?
5. How should participants score coalition and community power? Why?
6. What evidence exists that leadership is becoming more distributed?

7. What evidence suggests major decisions remain concentrated?
8. Is the Organizing and Advocacy Committee likely to strengthen participation? What additional structures would it need?
9. How effectively is the local using organizing data to guide its strategy?

Scenario: River Valley Education Association at a Crossroads

The River Valley Education Association (RVEA) represents approximately 4,200 education employees across a large suburban and rural school district. The membership includes teachers, paraeducators, transportation staff, food service workers, clerical employees, custodians, and substitutes. For years, RVEA relied heavily on a small group of officers and staff representatives to handle grievances, negotiations, communications, and member issues. Members generally viewed the union as a service organization. If someone had a problem, they called the union office. If there was a contract violation, a staff representative handled it. If there was an election or bargaining survey, members participated, but few viewed themselves as responsible for building the union.

Three years ago, district leaders began proposing significant budget cuts, citing declining enrollment and financial challenges. Members were frustrated by increased workloads, staffing shortages, and growing inequities between schools. Some worksites had strong union leaders and high member participation, while other worksites rarely held union meetings and struggled to communicate with members.

In response, RVEA's executive board launched a strategic effort to build a more organizing-focused union. The local divided the district into organizing regions and assigned officers and staff to conduct worksite assessments. They identified worksites with active representatives, worksites with informal leaders who were not serving in official roles, and worksites with little union structure at all.

Today, every worksite has at least one identified representative or point person. About 70% of worksites have functioning organizing teams with multiple member leaders. Several larger schools have developed building committees that include representatives from different departments and job classifications. However, the remaining worksites still rely heavily on one individual to communicate information and mobilize members.

The local recently expanded its bargaining team from 18 members to nearly 75 members. Bargaining team members are expected to bring information back to their worksites, hold update meetings, and report workplace concerns. The bargaining team includes representatives from different job classifications, including paraeducators and custodians who previously had little involvement in bargaining conversations.

To support organizing efforts, RVEA purchased organizing software that allows leaders to track member conversations, survey participation, structure tests, and worksite engagement levels. Some building leaders use the system regularly to identify participation gaps, map their worksites, and recruit new activists. Others rarely log in and continue to rely on personal relationships and informal communication.

The union has begun conducting regular organizing conversations. At some worksites, leaders systematically check in with coworkers, discuss workplace issues, identify concerns, recruit volunteers, and ask members to take action. At other worksites, communication still happens primarily during bargaining updates or when problems arise.

Last spring, the local conducted a district-wide petition campaign around staffing shortages. Participation reached nearly 80% overall, but there were major differences between worksites. Some schools achieved near-universal participation while others struggled to reach half of their members. Leaders used these results to identify where additional support and leadership development were needed.

The executive board has also shifted some budget priorities. Over the past two years, funding for conferences and travel has decreased while spending on organizing technology, member communications, leadership development, release time for site leaders, and campaign materials has increased. Some longtime activists support the changes, while others believe the local is neglecting professional development and state-level networking opportunities.

The role of staff has changed significantly. Staff representatives still handle advanced grievances and legal matters, but they increasingly coach worksite leaders to address Level 1 concerns themselves. Staff spend a growing amount of time training members, supporting organizing campaigns, analyzing participation data, and helping leaders develop strategic plans.

Not everyone is comfortable with this shift. Some members continue to expect staff to immediately solve workplace problems. Some worksite leaders feel anxious about handling difficult conversations with principals or coworkers. A few executive board members worry that leadership responsibilities are being pushed onto members too quickly.

At the same time, many emerging leaders report feeling more ownership over the union than ever before. Several paraeducators, early-career educators, and members from historically underrepresented groups have joined worksite teams and taken on leadership roles. The local has intentionally recruited leaders from job classifications and communities that were previously absent from decision-making spaces.

Despite these efforts, participation is not yet evenly distributed. Worksites serving large numbers of immigrant families have reported that language barriers sometimes limit engagement. Night-shift custodians rarely attend union meetings held after school. Some rural worksites have difficulty sending representatives to district-wide trainings because of

travel time. Although the union recognizes these barriers, members disagree about whether the local has done enough to address them.

The local is preparing for a major contract campaign next year. Leaders hope to build a supermajority structure capable of running coordinated actions at every worksite. They believe they have made substantial progress over the past three years, but they also acknowledge that participation, leadership development, communication systems, and equity practices remain uneven across the organization.

At the next leadership retreat, participants are asked to use the High Participation Local Assessment Tool to evaluate the current state of RVEA. Some leaders believe the local has become a high-participation organization. Others argue that significant elements of the old service model remain.

Discussion Questions for Participants

1. What score (1-4) would you assign in each of the 13 categories?
2. Which categories appear strongest? Why?
3. Which categories appear weakest? Why?
4. What evidence from the scenario supports your ratings?
5. Where do you see characteristics of both a service-model local and a high-participation local?
6. What would need to happen over the next year for RVEA to score a "4" in every category?
7. How effectively is the local centering equity in its organizing, leadership development, and participation structures?
8. What coaching recommendations would you give to RVEA's officers, staff, and worksite leaders?

High Participation Local Self- Assessment

Rating Scale

1	2	3	4
Low Participation	Emerging Participation	Growing Participation	High Participation Local

1. Distribution of Union Work

Who does the work of the union?

1	2	3	4
Officers, staff, and a handful of activists perform nearly all union work.	Some members assist with union work but remain dependent on officers and staff.	Worksite leaders and committees perform significant portions of union work with support and coaching.	Work is broadly distributed across trained worksite leaders and member teams. Officers focus on strategy, coalition work, political leadership, and organizational growth.

2. Worksite Representative Capacity

How capable are worksite leaders?

1	2	3	4
Representatives primarily relay information.	Representatives occasionally assist members with workplace concerns.	Representatives regularly organize members and handle basic worksite issues.	Representatives confidently address Level 1 concerns, organize coworkers, identify leaders, recruit members, and mobilize collective action.

3. Organizing Data

How are data used?

1	2	3	4
Data is mainly administrative.	Data is occasionally reviewed after campaigns.	Data informs some organizing decisions.	Data is routinely analyzed to identify engagement levels, leadership gaps, organizing opportunities, worksite capacity, and strategic resource allocation.

4. Member Engagement

What percentage of members take action?

1	2	3	4
Less than 20% regularly participate.	Participation centers around a small activist core.	Many (50-60%) members participate in campaigns and events when asked.	A supermajority of members (>75%) routinely participate in conversations, surveys, campaigns, meetings, actions, and leadership opportunities.

5. Organizing Conversations

How often are members engaged one-on-one?

1	2	3	4
Member contact occurs primarily during crises or dues collection.	Some organizing conversations occur during campaigns.	Worksite leaders conduct regular outreach.	Organizing conversations are a normal part of union culture, with leaders consistently identifying issues, building relationships, and developing activists.

6. Budget Alignment

What does the budget build?

1	2	3	4
Most spending supports governance,	Some funds support member	Significant resources support organizing and	Budget decisions intentionally increase organizing capacity through leader development,

1	2	3	4
conferences, and routine operations.	engagement activities.	leadership development.	worksite teams, member resources, communication systems, organizing technology, and campaign infrastructure.

7. Worksite Structures

How strong are organizing structures?

1	2	3	4
Few organized worksites.	Some active worksites.	Most worksites have functioning representative structures.	Every worksite has an effective organizing team capable of communications, issue identification, membership growth, advocacy, and campaign mobilization.

8. Internal Communication Systems

How do members learn and act?

1	2	3	4
Communication is one-way and inconsistent.	Information flows through a few activists.	Multiple communication methods exist.	Member-to-member communication networks exist in every worksite, allowing rapid dissemination of information and mobilization around union priorities.

9. Campaign Readiness

Can the local run a winning campaign?

1	2	3	4
Local relies on staff or outside support.	Local occasionally runs issue campaigns.	Local can conduct internal organizing campaigns.	Local consistently builds campaigns around clear goals including supermajority membership, supermajority participation, leadership growth, and collective action.

10. Coalition & Community Power

How connected is the local to broader community movements?

1	2	3	4
No meaningful coalition relationships.	Occasional participation in coalition events.	Active relationships with community partners.	Union regularly organizes alongside community allies, builds public support, increases coalition strength, and advances common-good campaigns.

11. Role of Union Staff

Who owns the work—the staff or the members?

1	2	3	4
Staff are the primary problem-solvers. They handle grievances, communications, organizing, and member issues. Members rely on staff to get things done.	Staff begin involving member leaders and worksite representatives in union work. Training and mentoring occur occasionally.	Staff regularly coach worksite leaders, assist with strategy, and support organizing efforts. Members increasingly handle workplace issues and organizing responsibilities.	Staff function primarily as organizers, trainers, strategists, and capacity-builders. Staff train members to address workplace issues, develop leaders, analyze organizing data, support campaigns, and strengthen worksite structures. Staff focus on building systems rather than solving individual problems.

12. Role of Union Leaders

Are leaders doing the work themselves, or developing others to lead?

1	2	3	4
Officers and executive board members perform most union	Leaders recruit volunteers and encourage participation, but	Leaders intentionally develop new leaders, delegate responsibilities, and	Leaders focus on strategic planning, political leadership, coalition building, restorative conflict resolution, campaign

1	2	3	4
functions, make most decisions, and solve most member problems. Leadership is concentrated in a small group.	still carry most responsibility for union operations.	build worksite teams. Leadership is becoming distributed.	development, and leadership recruitment. Their primary responsibility is developing other leaders and building collective power. Leadership exists throughout the organization rather than being concentrated in elected positions.

13. Centering Equity

The degree to which the local intentionally identifies, removes, and addresses barriers to participation, leadership, representation, and power based on race, class, gender, language, disability, job classification, work location, and other experiences that affect members' ability to fully engage in the union. A high-participation local treats equity not as a separate initiative, but as a core organizing strategy.

Who has access to leadership, participation, decision-making, and power in our union, and what barriers are preventing others from fully engaging?

1	2	3	4
Equity is rarely discussed or considered in decision-making. Leadership and participation tend to come from the same social groups. The local assumes everyone has equal access to participation opportunities.	The local expresses support for diversity, equity, and inclusion and occasionally offers trainings or recognizes equity concerns. There is growing awareness of participation gaps, but limited action to address them.	The local intentionally recruits leaders from underrepresented groups, begins examining participation and leadership data, and adjusts programs, communications, and structures to increase access and inclusion. Equity is incorporated into organizing, bargaining, and leadership development.	Equity is embedded in every aspect of union work. Leadership reflects the diversity of the membership. Participation barriers are regularly assessed and addressed. Organizing campaigns, bargaining priorities, communications, leadership recruitment, budget decisions, coalition work, and strategic planning are evaluated through an equity lens. Members most impacted by inequities are actively

1	2	3	4
			involved in shaping union priorities and strategies.

Scoring and Interpretation Process of the Self-Assessment

Step 1: Rate Each Category

For each category, assign a score from 1-4 based on the descriptions provided.

Score	Description
1	Low Participation
2	Emerging Participation
3	Growing Participation
4	High Participation