

Local Affiliate Self-Assessment

The **Local Affiliate Self-Assessment tool** is designed to assist membership organizing teams identify areas of strength and opportunity in their year-round organizing campaigns. Assess local needs around the seven key strategies and implement plans that build a framework for a year-round organizing strategy focused on membership growth and building capacity and power.

The Local Affiliate Self-Assessment tool* describes three possible levels for each key strategy:

Level 101: Foundational. Understands processes and strategies for member recruitment, engagement, and retention.

Level 201: Power-Building. Develops imaginative recruitment and retention strategies that continue to grow the Union's diverse membership and influence others to become more actively involved in the recruitment and engagement process.

Level 301: Agenda-Driving. Members own the agenda of the Union through their active participation and attitude towards collective action.

Note: It is likely that locals will have a range of ratings, depending on strengths and challenges. For example, a Local Affiliate may assess themselves at the *101: Foundational* level in one area, but at *301: Agenda-Driving* in another area. The Local Affiliate Self-Assessment tool offers specific, tactical insight on how to move from one level to the next. Reaching a rating of *301: Agenda-Driving* in any component is an opportunity to applaud success, test new innovative tactics, or invest deeper into successful tactics. Leaders at the 301 level may be asked to share their work with their colleagues in order to build capacity throughout our union.

*Self-Assessment level language taken from [NEA Leadership Competency Guide](#)

Key Strategy 1: Acquire, Use, and Manage Employee Lists

Rationale: Improve the processes and policies related to acquiring employee lists and managing lists effectively. Better list acquisition practices allow local affiliates to assess their member density and target their organizing resources.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>Inconsistent about asking for potential member lists.</p> <p>Member and potential member lists are kept predominantly at the building level and are not shared with local affiliate.</p> <p>Inconsistent procedures for requesting, securing, cleaning, and processing lists into a state-designated database (i.e., VAN or NEA360).</p> <p>Worksite-level or local-level leaders know the potential members but are not tracking trends.</p> <p>Potential member lists include only information to be able to contact potential members at work.</p> <p>Local leaders, Union Representatives, and/or UniServ staff have limited knowledge of how to use and/or manage employee lists once obtained.</p>	<p>List is asked for once a year from employer, and potential member lists are given to all Union Reps.</p> <p>List acquisition is a past practice but not formalized as part of contract language and/or employer policy.</p> <p>Active efforts to formalize list acquisition are happening through bargaining or employer policy.</p> <p>List obtained has some contact information to be able to contact potential members outside of work locations.</p> <p>List is accessible to union leadership only and may not be in a user-friendly format.</p> <p>Local uses surround sound tactics (social media, telephonic organizing, email, and SMS/Hustle) to clean and improve lists.</p> <p>Local Membership Processors, UniServ staff, and/or leaders understand how to use and/or manage employee lists once they are in the state-designated database.</p> <p>Leaders and/or Union staff use lists to make membership/activism asks.</p> <p>Local adopts a standard business practice for requesting, securing, cleaning, and processing lists into a state-designated database (i.e., NEA360 or VAN) and this is done at least twice per year.</p>	<p>Local receives employee lists for all new employee hires.</p> <p>List acquisition is part of contract language, state legislation, and/or employer policy.</p> <p>Procedure for requesting, securing, cleaning, and processing lists into a state-designated database (i.e., VAN or NEA360) is in place and happens at regular intervals throughout the year.</p> <p>Lists are accessible, in a user-friendly format, to key stakeholders (i.e., Union Reps, membership chairs, Member Organizers, etc.).</p> <p>Local has a designated person responsible for implementing the procedures listed above (i.e., membership chair).</p> <p>Local works with state affiliate to ensure that the state also has an accurate potential member list.</p> <p>List obtained has personal contact information, including personal phone number, address, and email for all potential members.</p> <p>Local uses surround sound tactics (social media, telephonic organizing, email, and SMS/Hustle) to clean and improve lists at least twice per year.</p>

Key Strategy 2: Engage All New Hires Throughout the Year

Rationale: Engage with new hires, potential members, and current members before orientation and year-round. A plan for continuous year-round outreach allows local leaders, Building and/or Union Reps, and Member Organizers to initiate one-on-one (1:1) conversations that establish the union as a trusted resource.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>First contact to new hires by local occurs at or after New Employee Orientation (NEO).</p> <p>Local does not receive new hire list prior to NEO.</p> <p>Local has not yet prioritized resources for pre-orientation engagement activities.</p>	<p>Limited engagement or outreach from the Local to new hires prior to NEOs.</p> <p>Some Union Reps are trained on 1:1 conversations and involved in reaching out to new hires.</p> <p>Some outreach to new hires occurs prior to NEO, but it is not systematic or sustained.</p> <p>Limited resources are available for pre-orientation engagement or are not utilized in a systematic way for all new hires.</p> <p>Some engagement events and 1:1s include a membership ask and tracking (Year-Round Organizing data) of the contact in VAN/NEA360.</p> <p>First contact with new hires by union occurs at NEO and new hires are asked to complete YRO surveys.</p>	<p>Local has a plan for engaging new hires through multiple contacts (3-7) between the date of hire and NEO.</p> <p>All Union Reps receive standardized training on 1:1 conversations and new hire recruitment before the start of the school year.</p> <p>Local utilizes support from state affiliate to engage Aspiring Educators (student members) and other graduating seniors at schools of education at hiring events.</p> <p>Majority of Union Reps and a diverse group of Worksite Activists are actively involved in reaching out to incoming new hires.</p> <p>All engagement events and 1:1s include a membership ask and tracking (Year-Round Organizing data) of the contact in VAN/NEA360.</p> <p>Local has dedicated resources to conduct pre-NEO engagements.</p> <p>Local works with state affiliate to reach out to former Aspiring Ed members and do a strategic ask.</p>

Key Strategy 3: Make a Membership and PAC Ask at Every New Employee Orientation and Union-Led Event

Rationale: Create a local plan to make a membership and PAC ask to every new employee at New Employee Orientation and any other union-led event. Make a game plan that helps Union Representatives, Member Organizers, and local leaders approach, recruit, and follow up with potential members throughout the year.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>Local attempts to track number of new hires before New Employee Orientation.</p> <p>Union Reps and worksite leaders from some worksites are present at the NEO/union-led event.</p> <p>UniServ staff and local leaders lead the planning and execution of NEOs.</p> <p>No training is provided to Union Reps and local leaders who volunteer for NEOs.</p> <p>Union has a presence at the NEO, but no time on the employer's event agenda.</p> <p>Limited 1:1 organizing occurs at the NEO.</p> <p>PAC asks are inconsistent at union-led events, and not all membership forms contain a PAC contribution ask.</p> <p>Local does not keep up or prioritize a plan for new hire recruitment throughout the year.</p> <p>Local has a limited system in place to assess NEO results and reconcile data to determine new members as well as identify potential members from YRO surveys and new hires who have not been engaged yet.</p>	<p>Local has a system to track and engage new employees in all classifications.</p> <p>Union Reps and worksite leaders from most worksites are present at the NEO/union-led event.</p> <p>Local leaders and Union Reps lead the planning and execution of NEOs.</p> <p>Limited NEO training is provided to Union Reps and local leaders who volunteer for NEOs.</p> <p>Local has a presence at NEOs and makes a transactional presentation and membership ask to the new employee cohort.</p> <p>Local focuses on PAC contributions as part of their Building Rep meetings, but not throughout the year.</p> <p>PAC contribution information is on the membership form.</p> <p>Most local-led events include a membership ask and a PAC ask.</p> <p>Intentional 1:1 organizing follow-ups occur after the NEO.</p> <p>Local leads on several NEOs scheduled throughout the year (including ESP & adjunct faculty, if applicable).</p> <p>Union member benefits partners participate in some NEOs at the start of the school year.</p> <p>YRO survey data is used sporadically for follow-up with members interested.</p>	<p>Every Union-led event includes a membership and PAC ask.</p> <p>Union Reps and worksite leaders from all worksites are present at the NEO/union-led event.</p> <p>Local leaders and Union Reps lead the planning and execution of NEOs.</p> <p>A comprehensive NEO training is provided to Union Reps and local leaders who volunteer before the NEO day.</p> <p>Worksite leaders plan and deliver NEOs that are adequately resourced, scheduled, and publicized by local.</p> <p>Union Reps execute 1:1 organizing follow-ups with all new employees after the NEO.</p> <p>Local leads on all NEOs scheduled throughout the year.</p> <p>Local has a comprehensive system in place to assess NEO results and reconcile data to determine new members as well as identify potential members from YRO surveys and new hires who have not been engaged yet.</p> <p>In the absence of an employer-run orientation, the union holds their own NEO for all new hires.</p> <p>Community organizations partner with local on events to offer support to new hires.</p>

Key Strategy 4: Organize Follow-Up Worksite One-on-One Conversations

Rationale: Focus on in-person follow-up conversations. Members are the most effective recruiters of new members. A strong follow-up plan supports Union Reps, Member Organizers, and worksite activists in having targeted one-on-one (1:1) organizing conversations with new and potential members at the worksite focused on issues and built on relationships, trust, and experience.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>Local has an inconsistent system to support, engage, and recruit most new employees hired throughout the year.</p> <p>Incomplete or fractured Union Rep structure.</p> <p>Local does not have assessment of worksite density.</p> <p>Follow-up conversations occur but are not tracked by the local.</p> <p>No collaboration between local and state affiliate to train Union Reps to execute and track follow-up conversations and membership asks.</p>	<p>Local has a system to support, engage, and recruit most new employees hired at the beginning of the year.</p> <p>Local has an adequate Union Rep-to-member ratio (i.e., 1:10).</p> <p>Local supports some Union Reps in having strategic follow-up conversations with all potential and new hires using the Year-Round Organizing data.</p> <p>Local has a process for sharing state affiliate YRO survey data that includes frequent conversations, but it is not always smooth or followed with fidelity.</p> <p>Local has assessment of worksite density for some classifications and worksites, but not all.</p> <p>In worksites that do not have identified Union Reps, local attempts to identify a pathway for new leader engagement, especially for new hires.</p> <p>Local tracks some follow-up conversation data in an electronic format, but not in NEA360 or VAN.</p>	<p>Local has a strategic plan to support, engage, and recruit all new employees hired throughout the year.</p> <p>Local has a strong Union Rep structure that includes a pathway for new leader engagement, especially new hires.</p> <p>Local supports Union Reps, Member Organizers, and worksite activists with training for follow-up with all members and potential members at each worksite.</p> <p>Local provides a consistent level of support, resources, and curriculum for Union Rep trainings.</p> <p>Local supports Union Reps in using YRO survey data to hold follow-up conversations with new hires and potential members. Data that is returned from the state level is used regularly at the local level.</p> <p>Local has a consistent tracking system in VAN/NEA360 for new hires in each worksite, follow-up 1:1s, and new/potential member density.</p>

Key Strategy 5: Use YRO Survey Data to Drive Decision-Making, Plan Campaigns, and Offer Engagement Opportunities

Rationale: Use data to drive decision-making and resource allocation. The YRO Campaign survey data identifies opportunities to develop activists, organizing campaigns, issue-specific education, and professional supports that help win campaigns.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>Local shares Year-Round Organizing data with state affiliate inconsistently.</p> <p>Local rarely collaborates with state association in using YRO survey data to plan programming and engagement events across the career continuum.</p> <p>Local has no targeted turnout plan for individualized conversations that lead to high attendance at engagement events.</p> <p>Local has sign-in sheets for engagement events, but rarely enters data into a useable database (i.e., VAN or NEA360).</p> <p>Local rarely uses YRO survey data to develop organizing campaigns, issue-specific education, and professional supports.</p>	<p>Local collaborates with state association in using YRO survey data to plan programming and engagement events across the career continuum.</p> <p>Local has inconsistent targeted turnout plan for individualized conversations that lead to high attendance at engagement events.</p> <p>Local has sign-in sheets and/or electronic data collection methods for engagement events, but inconsistently enters data into a useable database (i.e., VAN or NEA360).</p> <p>Local inconsistently utilizes YRO survey data to develop organizing campaigns, issue-specific education, and professional supports.</p>	<p>Local strategically collaborates with state association in utilizing YRO survey data to plan Union programming and engagement events across the career continuum.</p> <p>Local supports all Union Reps and leaders in using YRO survey data to provide individualized conversations for turnout at engagement events.</p> <p>Local has sign-in sheets and/or electronic data collection methods for engagement events and consistently enters data into a useable database (i.e., VAN or NEA360).</p> <p>Local consistently uses YRO survey data to develop organizing campaigns, issue-specific education, and professional supports.</p>

Key Strategy 6: Strengthen Leadership Structures at Every Worksite

Rationale: Natural leaders exist in all workplaces. It is essential to identify, train, support, and offer them pathways to using their skills to move others to action. Leaders should reflect the diversity of the potential membership.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>The Local team has no process for sharing union work with membership, so it happens inconsistently.</p> <p>Identification of new leaders/activists is inconsistent, with no formal assessment of activists.</p> <p>A clear pathway to further engagement and leadership roles in the union is not articulated to most members.</p> <p>A membership committee meets inconsistently, focusing on planning events and superficial engagements without a membership strategy or goals.</p> <p>Worksite leadership roles are undefined or sometimes vacant on most worksites and are not tracked in the NEA data ecosystem.</p> <p>Member Organizers are assigned to the worksite and are used mainly to recruit new members. They interact little with worksite leaders.</p> <p>Worksite leader meetings are inconsistently held and only focused on the local business.</p>	<p>Local has an identified leadership team and an executive board that reflects the diversity of the potential membership.</p> <p>There is a system of committees that represent the diversity of the potential membership. Committees meet regularly and report on their activities.</p> <p>Worksite leaders share information with their members.</p> <p>Identification of new leaders/activists occurs from currently active members but does not include assessments of potential new leaders or activists.</p> <p>A clear pathway to further engagement and leadership roles in the union is articulated to most members but not tracked.</p> <p>A membership committee exists and meets regularly. Meetings are focused on membership recruitment tactics.</p> <p>Worksite leadership roles are defined. 30% of worksites have vacancies and are not tracked in the NEA data ecosystem.</p> <p>Member Organizers coach other members and worksite leaders in organizing with staff support.</p> <p>Union Rep meetings are held but focused mainly on one-way communication of the local's business and issues/activities.</p> <p>Worksite leaders are expected to attend training at the beginning of each school year.</p>	<p>Local has an identified leadership team and an executive board that reflects the diversity of the potential membership.</p> <p>The leadership team meets consistently to conduct union business and yearly strategic planning.</p> <p>A system of committees represents the diversity of the potential membership. The committees meet regularly and are focused on accomplishing the union's strategic goals. Committees report regularly on their work and recruit new members.</p> <p>Worksite leaders share information with their members and are focused on organizing around worksite issues.</p> <p>New leaders/activists are consistently identified, and formal and informal assessments of activists are completed yearly.</p> <p>Members understand the pathway to further engagement and leadership roles in the union. Individual members' leadership pathways are tracked yearly.</p> <p>A membership committee exists and meets regularly. Meetings are focused on membership recruitment and organizing tactics.</p> <p>Worksite leadership roles are defined. All worksites have leaders, who are tracked in the NEA data ecosystem and assessed regularly.</p> <p>Member Organizers coach other members and worksite leaders in organizing without the need for staff support.</p> <p>Worksite leader meetings are consistently held and focused on the local business and accomplishing strategic goals.</p> <p>Worksite leaders are expected to attend training at the beginning of each school year, and additional training is held quarterly.</p>

Key Strategy 7: Build a Robust Communication System Within Your Union

Rationale: Communication structures facilitate two-way communication between rank-and-file members and leadership, emphasizing transparency and democratizing decision-making.

101: Foundational	201: Power-Building	301: Agenda-Driving
<p>Local's data management system has a home email and phone number for at least half of all members.</p> <p>A consistent email program reaches members but not potential members.</p> <p>Local doesn't yet have a website. If they do, it is updated inconsistently or does not offer contact information or an easy-to-find join link.</p> <p>Local union has a presence on popular social media channels with an active moderator.</p> <p>Local collects YRO survey data and uses the information to identify members' interests and target potential member recruitment.</p> <p>Local is inconsistent in communicating success stories and wins to members and potential members.</p> <p>Local President has attended a communications training and understands how to work with the local media.</p> <p>Surround Sound Manual</p>	<p>Local's data management system has a home email and phone number for a majority of all members.</p> <p>Local collects potential members' home emails and phone numbers.</p> <p>Member and potential member data are updated at least once a year.</p> <p>A consistent email and texting program reaches members and potential members.</p> <p>Communications with members have follow-up asks and provide opportunities for two-way communication and member feedback on the content.</p> <p>The union website is updated several times yearly and offers contact information and an easy-to-find join link.</p> <p>Local has carefully chosen which social media channels to use and keeps them regularly updated.</p> <p>Local collects YRO survey data and uses the information to identify members' interests and target potential member recruitment with specific asks or information based on the responses.</p> <p>Local consistently communicates success stories and wins quarterly to members and potential members.</p> <p>Local Leadership Team has attended a communications training and understands how to work with the local media.</p> <p>Surround sound tactics are used intentionally.</p>	<p>Local's data management system has a home email and phone number for nearly all members and potential members.</p> <p>Member and potential member data are updated frequently.</p> <p>A consistent email and texting program reaches members and potential members.</p> <p>Communications with members and potential members have follow-up asks and provide opportunities for two-way communication and member feedback on the content.</p> <p>The union website is updated frequently and offers contact information and an easy-to-find join link.</p> <p>Local has carefully chosen which social media channels to use and keeps them regularly updated.</p> <p>Local cross-posts on various social media platforms.</p> <p>Local collects YRO survey data consistently and incorporates the data into their strategic plan.</p> <p>Local uses hotlists to target members' engagement opportunities and recruit new members.</p> <p>Local consistently communicates success stories and wins along with ongoing work to members and potential members.</p> <p>Surround sound tactics are used intentionally during each phase of the YRO campaign.</p>