OEA LOCAL ASSESSMENT TOOL

BUILDING LOCAL CAPACITY



OEA LOCAL SELF-ASSESSMENT TOOL



Powerful Locals

A *powerful* local has a clear vision for its members- one that is widely supported and has set established goals and measurable objectives This local is constantly organizing, and as a result, its members are positioned as the voice of professional educators in your district.

CAPACITY INDICATORS

- <u>Advocacy</u>- The local advocates and engages with district administration on behalf of its members to improve working conditions, increase salaries and benefits, and to ensure that students obtain the highest quality education possible. A strong local is both a contract enforcer and one that mobilizes members around non-contractual member issues.
- <u>Contract Negotiations</u>- The local solicits member input for bargaining and develops strong member and community support. It takes the appropriate steps needed to build vital community support between bargaining cycles.
- Organizing and Strategic Planning- The local prioritizes learning its members' values, beliefs and issues. It establishes clear goals and strategic plans based on its members' wants and needs. Through ongoing feedback, the local evaluates its strategies and makes plan modifications that align with membership input and emergent organizational needs.
- Community Partnership- The local promotes community outreach and engagement with educational partners, parent groups, the business community, labor unions, labor-friendly coalitions, and social justice groups. The local mobilizes coalitions and partnerships to campaign for the continuous improvement of education.
- <u>Communication</u>- The local communicates information and vital issues to its membership and the public. The local trains and supports the growth of spokespersons, social media and print media teams.
- O Political Action and Lobbying- The local provides its members with vital political information and positions which promote the changes needed to improve public education. It encourages strong and active member legislative involvement with relevant education on policy matters and social justice issues that impact students and their profession. The local encourages contributions to OEA's Fund for Children and Public Education (FCPE) and recommends candidates that support the educational values of the association.



- <u>Leadership Development</u>- The local recruits, trains and develops future leaders. It develops training programs, workshops, retreats and presentations to further leadership development. A core component of this local is a strong Building Representative program. The local's representatives are the "face" of the local at each worksite and serve as on-the-ground organizers, advocates, recruiters and leaders.
- Governance Structure and Finances- The local runs efficiently with governance structures in place and is compliant with NEA and OEA constitution and by-laws, officer elections, and all the processes and procedures that define essential roles for the local. The local ensures that its internal finances are accurately maintained and that the financial systems are sound and transparent.

LOCAL SELF-ASSESSMENT TOOL

The Process:

The OEA local *self-assessment tool* is designed for leaders and members to assess and measure their overall organizational power, effectiveness, member engagement, strength and capacity. This tool focuses on <u>eight general indicators</u> that provide categories where the local can score itself on its demonstrated ability to perform in these specific areas. The local scores itself on any of the eight (8) diagnostic indicators to determine its *current* capacity in that area. Once the status of the indicators is reviewed and discussed, the results should guide the local's *PLANNING PROCESS*.

Once the local's capacity in the chosen area(s) has/have been assessed, strategies should be developed with the assistance of the OEA Labor Relations Consultant (LRC) in order to address any deficiencies or concerns. Note that some areas may take a *long-term* approach, while others may be *more immediate*, all of which should be reflected in the local's planning process. Assessing the local should never be done alone, and should include all of the locals' stakeholders such as the Executive Committee, Officers, and of course, the local's OEA Labor Relations Consultant. It is highly recommended that the local create an "Assessment Team."



LOCAL SELF-ASSESSMENT TOOL

DIRECTIONS: Chose One or Two Indicators...

Read each of the indicator statements for all eight categories to determine how well your local's effectiveness is performing *currently* in the indicator you have chosen and *circle* the statement in each column that best describes how the local is functioning. At the bottom of each column, place the number that corresponds to that circled rating. When each of the columns have been completed, total the sum of all the columns and then divide by five (5) to obtain the *average score for each page* (*indicator*). The average will be a number between 1 and 5 (*round to the nearest whole number*). A "1" rating signifies that the local is not building capacity, while a "2-3" rating signifies that the local is slowly moving in the right direction. A "3" rating signifies that the local is moving towards higher capacity, while a "5" rating means that the local has reached maximum capacity to build power amongst its members and in the local in that area.

THE EIGHT INDICATORS

Advocacy	Communication
Contract Negotiations	Political Action/Lobbying
Member Organizing	Leadership Development
Community Organizing	Governance/Finances

Example – If you have chosen Advocacy, this is what it could look like! Indicator-Advocacy

Rating	A. Member Education	B. Contract Maintenance	C. Grievance Processing and Member Defense	D. Relationship with District Administration	E. Collective Power
1.	0				
2.			<u>Q</u>		Q
3.		O			
4.				0	
5.					

Score A -1+ Score B-3+ Score C-2+ Score D-4+ Score E-2 = 12 ÷ 5 = 3



LOCAL SELF-ASSESSMENT TOOL

LOCAL INFORMATION: Name of Local: _____ Type of Local: Certified ESP Higher Ed Local President: _____ Local Assessment Date: _____ **Local Assessment Team Members:** Indicator(s) Chosen: **CAPACITY ASSESSMENT:** Our Local is currently at (Column/Row) _____ and through our work looks to move to _____. If we develop this capacity, we will be able to OEA LRC: _____ Local Membership Numbers: _____ Total Potential Membership: _____ Follow-up Strategic Planning Date: _____ Signatures:



LRC

Local President

INDICATOR: ADVOCACY

RANK	A. MEMBER EDUCATION	B. CONTRACT MAINTENANCE	C. GRIEVANCE PROCESSING & MEMBER DEFENSE	D. RELATIONSHIP WITH DISTRICT ADMINISTRATION	E. COLLECTIVE POWER
1.	We only provide advocacy training to a few leaders	Our leadership handles any and all contract maintenance issues	Our members expect local leaders or the LRC to handle any and all contract violations and working conditions issues	Our president meets with district administration only when there is an issue that he or she feels needs to be addressed	Our membership does not have a good sense of what it means to build collective power
2.	Our leaders and some members understand their contractual rights and benefits and can advocate for membership	Our members only pay attention to contract language when an issue arises	Our members understand the basics of the grievance process and who to take issues to in order to resolve them	Our president meets with administration on a monthly basis in order to resolve any issues	In collective activities (wearing buttons or union colors, etc.) approximately half of our members will participate
3.	Our leaders go to advocacy- based trainings and conferences once or twice a year. Our association representatives are trained in advocacy	Our association reps hold a few workplace meetings per year with members to talk about pending issues and member rights	Our local has an established procedure and Member Grievance Committee that process higher level grievances and issues	Our local's leadership and a member-committee meet on a monthly basis with the Superintendent or her/his representative	Our union regularly plans all member collective activities each year. We evaluate participation at these events
4.	We offer advocacy training opportunities for all of our members. Most members know the local's history and struggles and possess a shared understanding of collective power	Our association reps hold regular meetings with members at the worksite to discuss contract issues, bargaining, etc.	Our association reps are trained to represent members at the worksite level (Weingarten Rights) and handle lower level grievances	District administration allows our leadership to provide public updates at BoE meetings.	We have a system and team to turn out members for collective events. At work locations, our union provides a sense of identity, pride, and solidarity
5.	We have an annual advocacy training program for leaders, association representatives, and rank and file members. We regularly communicate advocacy wins to our membership	We regularly survey membership about contract maintenance issues. We set contractual goals around our meetings and surveys	Most of our grievances are resolved at the building level and/or mediated due to strong relationships built over time	We have attended training with our administration, and we are committed to work together for the benefit of students	We regularly assess the capacity of our membership at the member level and strategize how to best maximize our collective power. We regularly turn out 80-90% of our membership for events



CONTRACT NEGOTIATIONS

RANK	A. MEMBER PARTICIPATION	B. BARGIANING & ORGANIZING	C. BARGAINING & ORGANIZING	D. COMMUNITY ENGAGEMENT	E. CONTRACT RATIFICATION
		TEAMS	TRAINING		PROCESS
	Rank and file members are	Our bargaining team	Our bargaining team	Our union is not known in	Our local reaches TA's with
1.	not involved in the	members are appointed for	members have been	the community.	the district and verbally
	negotiations process unless	life	trained in the past and feel		"ratifies" the collective
	there is a bargaining crisis		that they are "expert"		bargaining agreement or
			negotiators		continually rolls over their
	Ma survey our membership	The bargaining team	Our loadership/hargaining	Our union has a limited	Contract Our president, officers and
2.	We survey our membership once a year or during the	The bargaining team members are always	Our leadership/bargaining team members attend	presence in their	bargaining team ratify the
2.	bargaining cycle	appointed by leadership	some trainings and	community and	changes in their collective
	barganning cycle	appointed by leadership	workshops as they become	participates in community	bargaining agreement
			available	activities.	Sarganing agreement
	We regularly assess the	We have multiple,	Bargaining team members	We are known in the	Members are notified of
3.	members bargaining	member-led teams or	attend regular negotiations	community and takes part	the changes in their CBA via
	interests as well as their	committees working	workshops, trainings, and	in several community	mail, e-mail and are asked
	commitment in obtaining a	towards a successful	conferences.	outreach and engagement	to vote by mail in ballot or
	strong contract	contract campaign. (e.g.		activities around public ed	to give their vote to their
		negotiations, organizing,		issues. We plan at least one	association representative
		community outreach)		community event a year.	
4.	Our negotiations team(s) work together early on in	Teams or committees meet	Our negotiators are up-to- date on strategies and	We have developed a	An "All-Member" contract presentation and
4.	order to educate and	regularly during a bargaining year to	techniques (traditional vs	strong community outreach/engagement	ratification meeting and
	engage members (internal	implement strategies to	IBB, etc.). Our local has	program and has developed	vote is held that engages
	organizing). Member to	support the bargain. We	"experts" for issues like	good relationships with	most of the local's
	member conversations	have a shared, consistent	salary and health care, that	community partners/allies.	membership
	provide the basis for	message that is regularly	regularly discuss trends	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,
	priorities/proposals	communicated.	with OEA staff		
	Our members are strong	We engage our members to	We have a continuous	Our community partners	An all-member contract
5.	stakeholders in contract	determine the goals and	training program that	advocate for public	presentation and
	negotiations. They are	strategies for our contract	identifies and trains current	education issues in line	ratification meeting is held
	involved and engaged at all	campaigns. Members	and prospective leaders	with the interests of the	the allows for maximum
	levels of the process	receive regular	over the life of the	local. Members are held as	member participation. The
	because the local is very	communications on our	contract.	"education experts" and	presentation includes the
	transparent with their goals	work and understand the		are sought for advice and	IBP and progression of
		value of our contract.		input into policy decisions.	issues to the final TA.



MEMBER ORGANIZING & STRATEGIC PLANNING

RANK	A. NEW MEMBER RECRUITMENT	B. MEMBER ORGANIZIN G	C. MEMBER ENGAGEMENT	D. POTENTIAL MEMBER STRATEGY	E. STRATEGIC PLANING
1.	We distribute membership materials to new hires at the beginning of every school year but have a limited presence at the new employee orientation	We depend on our LRC, Service Council or OEA for most of our member organizing needs	Members belong to our local but are not engaged or active. A small group of leaders or our LRC performs most of the work	We attempt to recruit single potential members from time to time.	Our union does not regularly plan but rather is reactive in nature
2.	Our leadership has a presence at the new employee orientation. A team distributes membership materials and promotional items to new employees	A few selected members have been trained to do member organizing	Our members are aware of some issues- when the local leaders bring them to their attention. Members are seldom involved in the decision-making process	We do a one-time membership "pitch" every year to potential members.	We survey membership during contract years and develop plans only a couple of months in duration
3.	We partner with district admin for new employee outreach/orientation. They meet them separately (luncheon, breakfast, etc.). Local leaders and association representatives reach all new members via a plan	We have a team that focuses on member organizing. Team members have organizing experience and training	Our local seeks regular input from current and new members and encourages members to get involved in local activities, committees and the political process	We keep track of potential members. ARs actively survey potential members at their buildings and worksites with varied success	We develop yearly plans whose goals are communicated to our membership
4.	We have a team that plans each year's orientation. We conduct one-on-ones with all new members. The plan nets between 80-90% of new employees each year	Our local is intentional in organizing our member around both building level and district concerns. We have an effective organizer in each location	We intentionally engage members at many different levels of the association and target new leaders for vital positions and committees	Our local has an organizing/member recruitment committee that targets and engages non-members on a yearly basis	Our leadership regularly recruits members for assessment and goal setting. We have done power studies and building mapping.
5.	We have a highly successful organizing, recruitment and new member engagement program that targets all member groups. We partner new members with veteran members	Our organizing team identifies both majority and minority concerns and guides our goal setting	We regularly have members looking to see how to get more involved in the association. Our activities provide value to the lives of our members	We regularly convert potential members to full members of our local. We have a plan for working with members considering leaving our membership	We have developed multi- year plans that bridge contract and political cycles.



INDICATOR: COMMUNITY ORGANIZING & CIVIC ENGAGEMENT

RANK	A. COMMUNITY	B. COALITION	C. SCHOOL BOARD	D. LABOR SOLIDARITY	E. UNION PRESENCE
	RELATIONS	DEVELOPMENT	ENGAGEMENT		
1.	We have little or no relationships to the community we work through our union	Our union does not participate in parent groups and other coalitions in the community	We are not involved at the school board level and do not regularly attend Board meetings	We have not built any solid alliances with the labor community	Community members largely don't know of our union
2.	Our President has a few connections in the community and works to maintain those relationships.	We only contact parents and other community groups in a time of crisis/need	Our president attends school board meetings but does not have much power or an impact on the decision-making process	We only contacts other labor unions when in crisis or when a looming labor dispute on its hands	Only during a crisis does our union becomes something the community talks about
3.	Our officers have a handful of important relationships in the district. We assess district relationships on a yearly basis.	Our union has established a positive relationship with parent and community groups and meets with them on a regular basis	Our officers attend regular school board meetings and routinely speak at "public comment" on issues that affect their members	Our leadership has a good relationship with some of the labor leaders in the community and they stay in touch by phone or when issues arise	Our local participates in a few annual events and receives some media attention for its efforts
4.	We have a community relations plan that is tied to the annual events in our district. The local has conducted many community power studies and has analyzed the data they have gathered on community leaders and members	We tap members to be liaisons to community groups to support both our activities and partners' agendas	Our members attend BoE meetings and have we a board liaison that takes notes. We have begun to cultivate relationships with board members	Our members have critical ties to other unions in the area. Relationships are mapped and used to further the goals of the local and other unions	Our union has a tradition of participating in the central annual events of our community with our community partners. We plan large events with partners
5.	We have a vibrant member driven community outreach program and have very strong ties with key stakeholders.	We have a strong relationship with parent/community groups. Mutual planning and assistance is ongoing and reciprocal.	The local has an ongoing working relationship with local board members, is involved in board races and exerts collective influence on BOE	We have a member liaison that attends local Labor Council mtgs. Labor solidarity is strong and Labor is ready to mobilize at a moment's notice	Our union is recognized as a trusted community partner and is an indelible part of the fabric of our community. Our annual event(s) is central to our community's calendar



COMMUNICATION

RANK	A. MEMBER CONTACT	B. INTERNAL COMMUNICATION	C. EXTERNAL COMMUNICATION	D. MESSAGING AND BRANDING	E. SOCIAL MEDIA
1.	We have member contact during, and on important crisis issues	We have minimal communications with our membership and/or our president handles all communication	We have very little contact with external groups, parents, labor unions	We have not developed a message or any branding for our members, district or the community	Our local has no social media presence
2.	We occasionally communicate with our membership; usually during contract negotiations	Our officers or association representatives occasionally distribute fliers in order to inform members of important issues	Our president has contact with a few groups, including the media, but only in times of crisis.	We have developed internal messages during contract negotiations but has not yet developed branding in order bolster its public image	Our social media participation is sporadic and only a few members follow
3.	Our president occasionally makes site and building visits to speak with members on important issues or to listen to grievances	We have a newsletter that goes out to members on a regular basis. The newsletter details local, district and state (OEA) information	We have a trained spokesperson that speaks on behalf of our association. We have a list of media contacts	We have a trained member committee that has developed strong internal and external messages that resonates with members as well as the community	Our social media sites have been successfully used to turnout members to events. We regular post member pictures/activities
4.	Our officers and association representatives hold regularly scheduled meetings with membership in order inform them and take feedback.	We have a website, e-mail/text blasts and telephone trees to contact members.	We regularly create new content and at least once a year publish material for external communications (endorsement, levy support, etc.)	Our members take pride in our brand and most of our members own our messaging at any given moment	We have a dedicated administrator(s) and rules for social media accounts, and nearly half of our membership goes to our social media sites.
5.	We have a member contact program that relies on member to member conversations to convey our message and understand concerns of membership	We have an updated contact database for all of our members. We regularly evaluate the most effective way to communicate with members	We have an ongoing relationship with local media, the opinions of our members are published, and we have a tradition of receiving earned media for our events	Our local's message and branding drives discussions about education and values in our district. Our messaging helps deliver new programs and policy	Our social media sites are used by both members and public to get important updates. We have a dedicated and trained social media team



POLITICAL ACTION/LOBBYING

RANK	A. MEMBER EDUCATION & ENGAGEMENT	B. ISSUE, LEVIES, LEGISLATIVE & CANDIDATE CAMPAIGNS	C. LEGISLATIVE ADVOCACY THROUGH FCPE	D. LOCAL BOE AND LOCAL POLITICS	E. MEMBER ORGANIZING
1.	Our local does not educate or engage its members in political action or lobbying	We make no effort to recruit members to work on recommended national, state or local candidate campaigns, legislation, issues, or levies	Our local has no political action committee and no members that participate in FCPE	We have no real connection with the district BOE nor participate in district politics	We do not organize our members around political issues, legislation or candidates
2.	Our president is active in local and state political advocacy/activism, but tends to "go it alone" without any member engagement	Leadership informs members of NEA, OEA, and local candidate voting issues and recommendations. A small core of members participates in the electoral process	Less than 5% of our membership is actively engaged in the political process at the local and state levels with FCPE	Our president handles all BoE matters. There are some established relationships with BOE members and community leaders	Our president or officers have some limited influence with BOE members, legislators, and community leaders
3.	Our leadership is actively involved in political advocacy. A few members receive political advocacy training	We have a political action committee that conducts political activity on behalf of the local	Our leadership stresses the importance of political involvement and FCPE contributions to increase participation and power	Local officers/political committee meet regularly to discuss legislative and BOE action items to share with members	Member mobilizing activities happen only during contract negotiations or political races, levy and ballot measures
4.	Most of our members participate in political advocacy activities. We have a political action or advocacy committee that recruits and develops trainings	Our political action committee recruits members to actively participate in targeted campaigns and issues. We have knocked doors, sent out mailings and held candidate nights	More than 15% of our members are active in FCPE contributions	The local organizes its members politically and recruits, screens and interviews, and recommends favorable candidates for BOE, etc.	Our local works to build political power through coalitions and relationships with board members and legislators
5.	Our local partners with OEA and member trainers every year to educate and engage its members on all levels and types of political activity (lobbying, endorsing, etc.)	Our members have a seat at the local levy committee table. Our political action committee has been active for several election cycles and candidates seek our endorsement.	The local leads the way in FCPE contributions. Our yearly FCPE campaign is understood as a core component of membership	The local is a strong political powerhouse in the community, elects pro-education candidates and influences district policies.	Our members determine the course of our local's political activity and are ready to mobilize for pro- education candidates/policies.



LEADERSHIP DEVELOPMENT

RANK	A. LEADERSHIP TRAINING	B. NEW LEADERSHIP	C. DIVERSITY IN LEADERSHIP ROLES	D. LEADERSHIP TEAMS	E. ASSOCIATION/ BUILDING
1.	Our officers do not provide leadership training for their members, but the officers themselves have attended regional or state trainings	Our local holds periodic elections and does not broadly communicate election timeline and procedure	Our local does not intentionally encourage or seek out diversity in different leadership positions	Our local has only one dedicated leadership team made up of its elected officers	REPRESENTATIVES We have no trained representatives at the different buildings or worksites in the district
2.	Our president/officers encourage members to seek leadership training opportunities and partner with OEA trainers at regional and state conferences	Our president identifies possible member leaders for future officer roles	There is some gender and racial diversity in the elected officers, as well as, in some of the leadership committees and teams	We encourage members to join committees or groups in the district so we can have a stronger voice in our profession	We have a fewer than 25 active association representatives per member. Members often do not know their Rep
3.	We provide some local training and workshops for our members by bringing in outside trainers (LRC's, etc.). The local sponsors members for selected conferences	Our officers understand the pressing issue of new leader recruitment and has identified a cohort of members for local leadership roles	We intentionally seek out minorities, millennials, and members from different job classifications, locations, and grades for key leadership roles	Our officers advocate for our members to be placed in key district team positions. Our core committee positions are full	We have greater than 25 representatives per member. They have been trained at various stages to perform union duties
4.	Our local president and officers have been trained on delivering workshops on enhancing leadership skills and regularly offer trainings in their local	Our local has an active new leader recruitment program that targets members with identified knowledge, skills and potential.	We yearly review the makeup of our leadership and explore how we can maximize representational balance	Our union makes critical decisions based on committee chair ideas and advice. We are widely represented throughout the district on numerous teams	We have a training program which teaches Rep's how to advocate, represent members and hold relational meetings. Reps hold regular building level meetings
5.	Our local has a committee that focuses on leadership development. We regularly provide training and campaign leadership opportunities to members	We systematically engage, recruit, train, develop and mentor new leaders for key leadership roles in the local association. Campaign responsibilities are assigned to new leaders	Our commitment to diversity is enshrined in our C&B. We are always seeking training how to best harness the diversity of our membership	Our team member experts influence district decisions and their advice is highly regarded by the public. Our committees are full and each committee seeks new participants to maintain capacity	The local has a strong training program led by senior Reps. Our member know our Reps and have regular face-to-face contract through 10 minute meetings or 1 on 1 conversations



GOVERNANCE/FINANCES

RANK	A. GOVERNANCE	B. MEMBER-	C. DISTRIBUTED	D. FINANCES	E. BUDGET
	STRUCTURE	DRIVEN GOALS	LEADERSHIP		
	We have an outdated	We do not have any	Our president does all of	We struggle to collect	We have low or no local
1.	Constitution and By-Laws and	clearly defined goals	the work. There is no	member dues, keep	dues to support our union
	it's a constant struggle to fill	for the association	delegation of labor and	accurate records and to	program
	leadership positions	other than that of	there aren't any	remain accountable and	
		defending our	committees. Officers follow	transparent. There are no	
		member's rights	their president	checks and balances	
	Our officers abide by the C&B	Our union has some	Our president and one or	Our local has	Our executive committee
2.	that has been updated at least	goals and outcomes	two officers do most of the	provisions/policies that	discusses the budget on a
	once in the past five years. They	that are shared out to	work of the local with little	govern the collection of	yearly basis
	hold officer elections and	the rest of the	delegation of duties	member dues and we work	
	schedule regular meetings	membership on a		with the district to ensure	
		yearly basis		dues deduction runs	
				smoothly	
	We have an updated C&B and	Our executive	Our officers have clearly	Our treasurer has a clear	We have multiple budget
3.	our officers attend most district	committee surveys	defined roles and	understanding of the local	lines to support the work of
	meetings, trainings, OEA	members from time to	delegation of duties. A few	finances, OEA policies and	our union. We seek
	conferences as well as	time in order to listen	member committees meet	procedures, applicable tax	additional funding to
	participate in the OEA and NEA	to their concerns and	on an ad hoc basis. Work is	laws, dues transmittal	supplement our local budget
	Representative Assemblies	ideas	done by Officers and AR's	process	
	Our membership knows its	We have clearly	Rank and file members are	We have trained a handful	We receive regular budget
4.	leadership and when issues arise	articulated goals that	encouraged to take on	of our members to	reports that are distributed
	members know who to go to. All	were developed from	different roles in the local	understand the roles and	at our executive and all
	of our committees are full with	ongoing listening to	and the work is performed	responsibilities of the local	member meetings
	active participants	and surveying of our	by many members	treasurer. Our treasurer	
		membership		has their support	
	Our union has representatives	We have both long-	The local is member-driven	Our local has more than six	A member budget
5.	operating at the building level,	term goals (3 year) and	and, although the	months and less than 36	committee, provides a
	school district level, OEA district,	short-term objectives	president and officers lead	months of operating	quarterly budget report
	and state association. Our	(in a year). These goals	the association, members	expenses. We are annually	which is tied to the goals of
	membership understands the	are re-evaluated every	are actively engaged and	audited	the local
	value of our broad influence	year	involved at all levels		







SO, WHAT'S NEXT?

After your local's **Assessment Team** has met, discussed the findings, and have reached a consensus on the local's immediate needs and priorities (short-term), as well as identifying those which are more long-term, the team needs to create **SMART goals** to achieve them. **FOCUS on Questions such as...** What can be achieved right now? What can be done in three months, six months, or a year? What resources are needed? Who will be responsible and accountable for the work?

Sharing Information With Your Members:

The Assessment Team and the local's leadership should share the assessment results with the membership in an all-member meeting. This is a perfect opportunity to *personally engage members and share the local's priorities*. It is also a great way to receive feedback, member-input and provide members with a voice. By doing this, you identify member interests, passions, and gauge commitment and involvement, especially by asking new members or members that have not participated in any of the local's activities in the past to work together to help achieve the local's goals. Furthermore, a public presentation of the material can orient the local to a set of common objectives and support solidarity throughout the local's activities.

OEA Organizing and Membership Engagement Department LRC Field Version September 2024



