



*A Union of Professionals*

**AFT LEADERSHIP  
EDUCATION AND DEVELOPMENT**

# CHARTING YOUR LOCAL UNION'S DEVELOPMENT

Creating an effective Local Union is a developmental journey. The accompanying chart describes the developmental path of each of the six elements of an effective local.

- Which stage best describes your local union in each element of an effective local?
- Where should you focus your attention and energy to make the biggest impact on the challenges facing your local union?



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#### Our Mission

The **American Federation of Teachers** is a union of professionals that champions fairness; democracy; economic opportunity; and high-quality public education, healthcare and public services for our students, their families and our communities. We are committed to advancing these principles through community engagement, organizing, collective bargaining and political activism, and especially through the work our members do.

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## Completing the Assessment

The following pages describe elements of effective local unions. The purpose of this assessment is to identify your local's opportunities for development as well as existing strengths to build on.

To complete the assessment,

### **First, individually**

1. Review the description of the elements of effective local unions (attached)
2. On the assessment, check the boxes of the statements that apply to your local.
3. For each element, note where the majority of your checks fell. For example, you may have checked statements in all four stages *for building high functioning local unions* but find that you have the most marks concentrated at stage 2. Note your response on the Assessment Summary.
4. Note the distribution of your total marks. You will likely be stronger in some elements than others. What are your top two strongest areas (most advanced stage)? What two areas are most lagging in development (least advanced stage)?

### **Then, as a group**

5. Once each member of your team has completed the assessment, compare your self-assessments.
  - a. Where are you in agreement? Did you mark the same statements? What examples from your own experience within the local can you use to illustrate your assessment?
  - b. Where do your assessments differ from each other? Without trying to convince other team members of your rightness, each person share the reasoning behind the marks. Which statements most resonate with you? What examples do you have from your experience of the local?
  - c. Now that you've heard from each team member, are there any marks you would change?

Note: It is less important to agree on a *score* than it is to share an understanding of the strengths and challenges of the local. That is, you may agree that *engaging with the community* is an area for development without agreeing on the stage you think the local is in.

### Charting your Local Union's Development

Elements of Effective Local Unions	Stage 1 Sample Characteristics	Stage 2 Sample Characteristics	Stage 3 Sample Characteristics	Stage 4 Sample Characteristics
<b>1. Building high-functioning local unions</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Small core group of activists with strong personal relationships</li> <li><input type="checkbox"/> Activists wear multiple hats; roles assigned as needed</li> <li><input type="checkbox"/> Reliant on state staff rep for negotiations/consultation and member advocacy</li> <li><input type="checkbox"/> Members see union as a service provider</li> <li><input type="checkbox"/> Bargaining results announced after the fact</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Constitutional roles established and E-board roles filled</li> <li><input type="checkbox"/> E-board making decisions and following through with action</li> <li><input type="checkbox"/> Able to delegate some tasks to committees, stewards</li> <li><input type="checkbox"/> Stewards, worksite leaders, officers, &amp; bargaining team members committed to building their skills</li> <li><input type="checkbox"/> Systems in place to monitor fiscal health, &amp; compliance with regulations</li> <li><input type="checkbox"/> Advance planning (survey, one-one's) for contract negotiations and campaigns</li> <li><input type="checkbox"/> Regular bargaining updates</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Committee and activist structure is reliable, effective, and widespread</li> <li><input type="checkbox"/> Clear accountability and mutual learning processes in place</li> <li><input type="checkbox"/> Stewards, members and others see union as dynamic, diverse, and inclusive</li> <li><input type="checkbox"/> Annual budget plan, aligned to priorities</li> <li><input type="checkbox"/> Goals and success measures clear and used and celebrated</li> <li><input type="checkbox"/> Members developing trust in union's ability to achieve goals as a team</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Leadership seen as trustworthy, authentic, and effective</li> <li><input type="checkbox"/> Planning is multi-year, with broad membership involvement</li> <li><input type="checkbox"/> Decisions made and effective follow-up occurs because all know roles and work together</li> <li><input type="checkbox"/> Conversations on internal disagreements frank, productive</li> <li><input type="checkbox"/> Members see themselves as the union</li> </ul>
<b>2. Using knowledge and ideas to creatively solve problems</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Problem-solving activity in reaction to Individual or small group issues at worksite.</li> <li><input type="checkbox"/> Primary concern with economic issues, other issues only addressed in defense.</li> <li><input type="checkbox"/> Collective bargaining, meet and confer, and grievance handling are the strategies most often used for solving immediate problems</li> <li><input type="checkbox"/> Bargaining/advocacy is conducted by small team</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Beginning to address professional needs of members, e.g. evaluation.</li> <li><input type="checkbox"/> Initiating discussion forums with members/management/community on challenges to public services</li> <li><input type="checkbox"/> Members' expertise used as resource for solving problems</li> <li><input type="checkbox"/> Creative problem-solving, e.g. labor-management forums, external committees, team meetings, etc.</li> <li><input type="checkbox"/> Using CB and/or consultation to advance union involvement in problem-solving</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Articulating a vision and proposing solutions improve the workplace and advance quality services</li> <li><input type="checkbox"/> Reputation for proactive approaches to public service/community issues.</li> <li><input type="checkbox"/> Seen as resource on professional issues by members, employers and the community</li> <li><input type="checkbox"/> Leaders invited to speak to other groups re: our issues</li> <li><input type="checkbox"/> Creative and inclusive problem-solving methods</li> <li><input type="checkbox"/> Worksite leaders bring members into problem-solving on all issues</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Recognized as innovative and focused on solutions.</li> <li><input type="checkbox"/> Broader community, politicians echo/follow local's lead on professional issues.</li> <li><input type="checkbox"/> Research driven vs. self interest driven</li> <li><input type="checkbox"/> Leaders invited to speak at professional and community issues,</li> <li><input type="checkbox"/> Multiple members serve on outside boards, committees or commissions working on community solutions</li> <li><input type="checkbox"/> Expert use of all advocacy tools</li> </ul>

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Elements of Effective Local Unions	Stage 1 Sample Characteristics	Stage 2 Sample Characteristics	Stage 3 Sample Characteristics	Stage 4 Sample Characteristics
<b>3. Membership Engagement and Organizing</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Primary union function is bargaining/grievance handling/advocacy</li> <li><input type="checkbox"/> Membership low in numbers overall</li> <li><input type="checkbox"/> Leaders occasionally asks members for small, low risk actions, e.g. forward a message, sign a petition</li> <li><input type="checkbox"/> Little new member/potential activist recruitment</li> <li><input type="checkbox"/> Members see political/social justice issues as outside of the union's realm</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Efforts made to do traditional activities with higher involvement, e.g. bargaining campaign committee, group grievances, petitions.</li> <li><input type="checkbox"/> Worksite reps encouraged to seek participation in new low risk activities</li> <li><input type="checkbox"/> Beginning accountability measures for members and leaders</li> <li><input type="checkbox"/> Membership is growing, via reps/leaders asking for participation and membership through multiple methods</li> <li><input type="checkbox"/> Strategy developed for outreach to and activation of new employees as members and potential members</li> <li><input type="checkbox"/> Members conduct in-depth conversations around the union's issues</li> <li><input type="checkbox"/> Local beginning to connect with and support members on outside issues</li> <li><input type="checkbox"/> Members regularly participate in mobilization activities, e.g. door knocking, phone-banking, worksite meetings, union actions</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Many union activities designed/rethought to encourage involvement</li> <li><input type="checkbox"/> Growth targets identified and worked, by activists beyond reps</li> <li><input type="checkbox"/> Member-to-member conversations occur regularly to build membership and engagement</li> <li><input type="checkbox"/> Member involvement recognized and celebrated at union meetings/events</li> <li><input type="checkbox"/> Leaders and stewards routinely talk about organizing conversations</li> <li><input type="checkbox"/> Leaders, stewards and activists hold each other accountable for getting commitments from members for union activities</li> <li><input type="checkbox"/> Pipeline of activists to fill future officer needs</li> <li><input type="checkbox"/> Members identify themselves as union activists with outside affiliates and speak to shared issues</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Members see themselves as the heart of the union and part of a larger movement</li> <li><input type="checkbox"/> Members regularly volunteer to work on internal and external activities.</li> <li><input type="checkbox"/> Membership is defined as being part of a broader professional community and labor movement</li> <li><input type="checkbox"/> All members engage occasionally in union activities and sometimes all engage at once in critical efforts,</li> <li><input type="checkbox"/> Every campaign is designed to build union capacity and power</li> <li><input type="checkbox"/> Members talk like organizers when engaged in union activities</li> <li><input type="checkbox"/> Mutually beneficial relationships are built with members as key components.</li> </ul>

### Charting Your Local Union’s Developments

Elements of Effective Local Unions	Stage 1 Sample Characteristics	Stage 2 Sample Characteristics	Stage 3 Sample Characteristics	Stage 4 Sample Characteristics
<b>4. Engaging with the community</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> No formal engagement with community organizations</li> <li><input type="checkbox"/> Members engage in community issues as individuals</li> <li><input type="checkbox"/> Local unaware of members involvement with outside organizations and community issues</li> <li><input type="checkbox"/> Union seen by community as focused on member interests</li> <li><input type="checkbox"/> No community engagement committee</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Occasional relationships with community players, when union needs demand it</li> <li><input type="checkbox"/> Alliances are short-term and tactical, e.g. for this campaign to help the local.</li> <li><input type="checkbox"/> Cultural competency within union is expanding/taken seriously as a need and goal</li> <li><input type="checkbox"/> One-on-one conversations with community based groups to understand their issues</li> <li><input type="checkbox"/> Union has a functioning community engagement committee that regularly attends and reports at E-board meetings</li> <li><input type="checkbox"/> The committee reflects the diverse demographics of the local’s membership</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Union engagement is frequent, deliberate, based on mutual needs</li> <li><input type="checkbox"/> Local is willing and able to support other organizations’ issues.</li> <li><input type="checkbox"/> Members actively look to create connections between their own communities and union</li> <li><input type="checkbox"/> Members trust union to be culturally competent inside and externally</li> <li><input type="checkbox"/> Local actively looks to stretch and create connections with nontraditional influential organizations.</li> <li><input type="checkbox"/> Members are recruited to participate and lead member mobilizing committees around local and community partnership issues</li> <li><input type="checkbox"/> Personal relationships between members, staff, union leadership and community partners are developed</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Union is respected and sought out by community organizations and members.</li> <li><input type="checkbox"/> Union valued by community members as a voice for broadly shared interests and values</li> <li><input type="checkbox"/> Local is respected and active leader on area labor council</li> <li><input type="checkbox"/> Union has a diverse set of allies with regular attention given to maintaining and strengthening the relationships</li> <li><input type="checkbox"/> Local formally adopts issue(s) critical to local community partners</li> <li><input type="checkbox"/> Members can articulate why and how local is actively advancing broader agenda with community partners</li> <li><input type="checkbox"/> Members participate in actions as part of shared issue campaigns with community partners</li> </ul>

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Elements of Effective Local Unions	Stage 1 Sample Characteristics	Stage 2 Sample Characteristics	Stage 3 Sample Characteristics	Stage 4 Sample Characteristics
<b>5. Participating in policy and politics</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use bargaining/advocacy to influence worksite policy</li> <li><input type="checkbox"/> Members participate in local politics as individuals</li> <li><input type="checkbox"/> COPE/PAC fundraising is occasional or sporadic</li> <li><input type="checkbox"/> Distributes emails, workplace fliers on political issues</li> <li><input type="checkbox"/> Leaders know their state representative and senator and how to contact them if needed</li> <li><input type="checkbox"/> Leaders attend state federation lobby days</li> <li><input type="checkbox"/> Union provides members with information about the candidates' issue positions</li> <li><input type="checkbox"/> Members understand that a portion of dues money is used for political purposes</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Union participates in labor/management committees on policy at worksite</li> <li><input type="checkbox"/> Leaders speak on policy questions at available forums, school board meetings, etc..</li> <li><input type="checkbox"/> Union has a legislative committee with a chairperson and other members</li> <li><input type="checkbox"/> Members know that their working conditions are impacted by legislative action</li> <li><input type="checkbox"/> Some limited organizational support for political candidates, walks, phone banks</li> <li><input type="checkbox"/> Limited involvement in coalitions</li> <li><input type="checkbox"/> Some formal COPE/PAC structures exist</li> <li><input type="checkbox"/> Teams are sent to state federation lobby days</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Union sometimes systematically builds support for policy innovation among members, community</li> <li><input type="checkbox"/> Nearly all members vote in all elections</li> <li><input type="checkbox"/> Ongoing coalition partners support our policy directions</li> <li><input type="checkbox"/> Influential in several policy arenas, mostly local</li> <li><input type="checkbox"/> Mobilize members for own political priorities.</li> <li><input type="checkbox"/> Systematic/formal COPE committee/Political fundraising</li> <li><input type="checkbox"/> Formal candidate endorsement</li> <li><input type="checkbox"/> Participation in state federation and local Central Labor Council candidate endorsement process</li> <li><input type="checkbox"/> Members see connection between working conditions and larger political context.</li> <li><input type="checkbox"/> Members participate in Lobby Day and/or in-district meetings with lawmakers</li> <li><input type="checkbox"/> Union has a plan to spend COPE dollars on local elections (i.e. school board and legislative contests)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Able to be influential in all relevant local policy and political arenas.</li> <li><input type="checkbox"/> Widely respected by officials and sought out for policy expertise.</li> <li><input type="checkbox"/> Driving broad improvement agenda as thought and action leaders</li> <li><input type="checkbox"/> Broad member support for COPE fund</li> <li><input type="checkbox"/> Union support for candidate seen as positive by general community</li> <li><input type="checkbox"/> Members connect their conditions to conditions of others in the community. Recognize tied destiny.</li> </ul>

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<b>6. Connecting through communications</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Communications targeted to internal audience.</li> <li><input type="checkbox"/> Local website/Facebook page with basic information</li> <li><input type="checkbox"/> Activists communicate primarily with each other</li> <li><input type="checkbox"/> Local is not well known by outside media</li> <li><input type="checkbox"/> Able to survey members and get limited returns</li> <li><input type="checkbox"/> Bulletin boards refreshed regularly in some worksites</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Expanding number of communications activities on as-needed basis</li> <li><input type="checkbox"/> No strategy for systematic message shaping or distribution</li> <li><input type="checkbox"/> Message shaping and distribution ad hoc for each event or campaign</li> <li><input type="checkbox"/> Real mobilizing conversations by small percentage of Reps</li> <li><input type="checkbox"/> Worksite meetings conducted in some locations</li> <li><input type="checkbox"/> Regular but infrequent formal communications whether paper/electronic</li> <li><input type="checkbox"/> Union contacted by media after the fact</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Effective use of one-on-one and small group meetings to amplify membership meetings</li> <li><input type="checkbox"/> Message strategy emerging</li> <li><input type="checkbox"/> Developing relationships with one or two media outlets e.g. editorial board meetings with local news organizations, occasional op-ed published</li> <li><input type="checkbox"/> Expanding number of Reps hold mobilizing conversations and worksite meetings</li> <li><input type="checkbox"/> Union activists speak occasionally to parent, patient, or community groups</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> All communication is strategic</li> <li><input type="checkbox"/> Union’s message is echoed among community partners and officials.</li> <li><input type="checkbox"/> Two-way flow allows local to adjust based on feedback.</li> <li><input type="checkbox"/> Regular use of social media, paper communications, etc.</li> <li><input type="checkbox"/> Media seeks out union opinion before printing stories</li> <li><input type="checkbox"/> Union publically shares credit with others and others mention union support and issues</li> </ul>



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