

# Local Self-Assessment



It all starts here!





## Dear Local Leader,

A full capacity local is one that is vibrant, relevant, strong and dedicated to member service. Building a full capacity local starts with having a good understanding of your local's strengths and weaknesses. Working through the BFCL self-assessment will help you gain this understanding.

You may want to encourage all of your local's leadership team to take the self-assessment. This could include committee chairs, building/association representatives, officers and your UniServ director. The self-assessment is designed to give you a good idea of where your local needs to develop more capacity and it can serve as a springboard for long-range planning and goal setting.

A great follow-up to the self-assessment is "Getting Strategic" – a guide to long-range planning for local leaders. It's simple, to the point and contains all of the information you need to develop and implement a long-range plan for your local.

The goal of the Building Full Capacity Locals initiative is to provide you with the materials, resources and trainings you need in order to increase the capacity of your local. MEA resources are listed in each section of the self-assessment to get you started. Training opportunities and new materials will be offered to all local leaders throughout the year. Further, training can be developed and brought to your local, coordinating council or region based on your needs and upon your request.

This booklet, along with other materials, information and support are designed to help you strengthen your local association and get more members involved. These are available by contacting MEA Field Services 800-292-1934, ext. 2941 or by downloading at [www.mea.org/bfcl](http://www.mea.org/bfcl) under Local Funding Program. If you are having a large group take the assessment, you may want to try the format under Google Documents. Contact 800- 292-1934, ext. 2941 if interested.

## Advocacy: Bargaining, Contract Maintenance and Member Defense

Advocacy in bargaining, grievance processing, arbitration and tenure proceedings are the core services for which our members pay. In a full capacity local, members have access to the member rights structure and a clear understanding of the role and obligation of their association in the advocacy process. All members have an understanding of the concepts of collectivism and profession unionism as well as knowledge of the local's history. Association leaders are well educated in the areas of bargaining, advocacy and labor laws and receive ongoing training and updated information. The local's long-range plan addresses bargaining goals as well as plans for ongoing contract assessment and awareness. Local leaders have a good, working understanding of the contract.

**Respond to the following statements by checking Yes (Y), Somewhat (S), No (N) or Don't Know (D)**

|     |   | Y | S | N | D |
|-----|---|---|---|---|---|
| 1.  | Members in my local have a clear understanding of the role and obligations of our association.  |   |   |   |   |
| 2.  | Members in my local have a good understanding of the bargaining history of our association.   |   |   |   |   |
| 3.  | Members in my local have a good understanding of the importance of the state and local association in their professional lives.                         |   |   |   |   |
| 4.  | My local's leadership team has a good understanding of the concept of member advocacy and what their responsibilities are toward members.               |   |   |   |   |
| 5.  | My local's leadership team is familiar with the legal obligations of representation.  |   |   |   |   |
| 6.  | Building reps in my local clearly understand what they are supposed to do at the building level.  |   |   |   |   |
| 7.  | The leaders in my local understand how to process grievances.   |   |   |   |   |
| 8.  | My local has a standing grievance committee.  |   |   |   |   |
| 9.  | The leadership team in my local has up-to-date information on labor issues/laws.  |   |   |   |   |
| 10. | The leadership in my local has up-to-date bargaining training.  |   |   |   |   |
| 11. | The leadership team has knowledge of bargaining trends around the state.  |   |   |   |   |
| 12. | The numbers in my local have input into the bargaining process via surveys, focus groups, etc.  |   |   |   |   |
| 13. | The leaders in my local have a good understanding of the contract.  |   |   |   |   |
| 14. | The members have bargaining goals as of part of its long-range plan.  |   |   |   |   |
| 15. | The leaders of my local regularly communicate with other locals at the region and coordinating council levels regarding bargaining and advocacy issues. |   |   |   |   |
| 16. | My local has maintained detailed records/files regarding past bargaining, contract issues, grievances, etc.   |   |   |   |   |
| 17. | The leaders in my local are able to effectively problem solve.  |   |   |   |   |

# Communications

Local association cannot succeed, create alliances, or persuade others to support its efforts without a strong communications plan that addresses both external and internal public relations. In a full capacity local, there is a standing communications committee with a well-trained, proactive, creative chairperson. The local's long-range plan contains clear goals for internal and external communications along with a plan of implementation. The leadership team is well- trained in such areas as Web site creation, newsletter writing, communication skills, media relations, and message development. Member communication is ongoing, frequent and takes many forms. The association is visible in the community, at district functions, and in the local press. Members are provided with numerous, association- organized opportunities to meet together to socialize as well as to receive training and information.

*Respond to the following statements by checking Yes (Y), Somewhat (S), No (N) or Don't Know (D)*

|     |  | Y | S | N | D |
|-----|--|---|---|---|---|
| 1.  | My local has an active communications (public relations) committee.  |   |   |   |   |
| 2.  | My local's long-range plan contains goals for internal and external communications.                            |   |   |   |   |
| 3.  | Communications/public relations are a high priority for my local.  |   |   |   |   |
| 4.  | My local has a regularly updated website.  |   |   |   |   |
| 5.  | My local has a regularly published newsletter.   |   |   |   |   |
| 6.  | The leadership team in my local has contact with the local media.  |   |   |   |   |
| 7.  | The community is familiar with my local and its functions.   |   |   |   |   |
| 8.  | The leaders in my local use e-mail as a communications tool.   |   |   |   |   |
| 9.  | The leaders in my local utilize the MEA website <a href="http://www.mea.org">www.mea.org</a> .                 |   |   |   |   |
| 10. | Members in my local are encouraged to use the MEA website.   |   |   |   |   |
| 11. | The leaders in my local are a part of <a href="http://mymea.org">mymea.org</a> .                               |   |   |   |   |
| 12. | My local has a specific plan for communication with new members.   |   |   |   |   |
| 13. | My local is actively involved in community and district activities.  |   |   |   |   |
| 14. | My local provides planned opportunities for members to meet and socialize together.                            |   |   |   |   |
| 15. | My local provides planned training and professional development opportunities for members.                     |   |   |   |   |
| 16. | The leaders in my local understand how to communicate with the media.  |   |   |   |   |
| 17. | My local's budget contains specific funds for communications/public relations activities.                      |   |   |   |   |
| 18. | My local provides specific programs for new members.   |   |   |   |   |
| 19. | There is ongoing communication between leaders and members in my local.  |   |   |   |   |
| 20. | The members in my local are regularly updated on local, state, and national association activities and issues. |   |   |   |   |

# Financial and Membership Systems

Accurate and well-maintained financial and membership records are essential components of a well-run organization. A full capacity local has clear and effective provisions for collecting membership information, appropriate record keeping, accountability, and checks and balances. Such a local has a standing budget committee and a well-trained treasurer who has a clear understanding of the budget process, dues collection and transmittal, applicable tax laws and who clearly communicates this information regularly to the local leadership team. Development and passage of a budget is a yearly activity, and the budget reflects the long- and short-term goals of the local.

*Respond to the following statements by checking Yes (Y), Somewhat (S), No (N) or Don't Know (D)*

|     |   | Y | S | N | D |
|-----|---|---|---|---|---|
| 1.  | My local has a standing budget committee.   |   |   |   |   |
| 2.  | My local has an elected treasurer.  |   |   |   |   |
| 3.  | My local treasurer understands how to develop and maintain a budget.                                |   |   |   |   |
| 4.  | My local treasurer regularly communicates budget information to the rest of the local leadership.   |   |   |   |   |
| 5.  | My local treasurer produces a monthly treasurer's report.   |   |   |   |   |
| 6.  | My local has budget development and passage as a yearly activity.                                   |   |   |   |   |
| 7.  | The budget in my local reflects our long- and short-term goals.                                     |   |   |   |   |
| 8.  | My local has a checks and balances system in place to ensure financial accountability and accuracy. |   |   |   |   |
| 9.  | My local maintains accurate membership records.   |   |   |   |   |
| 10. | My local maintains accurate financial records.  |   |   |   |   |
| 11. | My local has the ability to transmit dues to MEA in a timely manner.                                |   |   |   |   |
| 12. | My local has an audit committee.  |   |   |   |   |
| 13. | My local undergoes a yearly financial audit process.  |   |   |   |   |

# Governance

Governance of a democratic organization to run efficiently, there are fundamental governance structural requirements that need to be in place. In a full capacity local, these include a regularly updated constitution and bylaws as well as clearly defined roles and responsibilities for leaders, staff and committees, which are communicated to all members. Association meetings are regularly scheduled with established agendas and run according to parliamentary procedure.

*Respond to the following statements by checking Yes (Y), Somewhat (S), No (N) or Don't Know (D)*

**Y S N D**

| 1.  | My local has a constitution and bylaws.  |  |  |  |
|-----|--|--|--|--|
| 2.  | The constitution and bylaws have been updated within the last five years.  |  |  |  |
| 3.  | My local's constitution and bylaws have been submitted to MEA's Governance Review Committee for approval.                        |  |  |  |
| 4.  | The roles and responsibilities for elected leaders in my local are spelled out and understood.                                   |  |  |  |
| 5.  | The roles and responsibilities for MEA staff (e.g. UniServ Directors) are clearly spelled out and understood.                    |  |  |  |
| 6.  | The roles and responsibilities for committee chairs are clearly spelled out and understood.                                      |  |  |  |
| 7.  | Members have a good understanding of the governance structure of both the local and the state association.                       |  |  |  |
| 8.  | Leaders and members have a good understanding of the purpose and function of the local's coordinating council, region, and zone. |  |  |  |
| 9.  | The leadership team of my local has knowledge and understanding of the constitution and bylaws.                                  |  |  |  |
| 10. | The constitution and bylaws are adhered to and guide local activities and decisions.   |  |  |  |
| 11. | My local holds regularly scheduled association meetings.   |  |  |  |
| 12. | Association meetings follow an agenda developed in advance.  |  |  |  |
| 13. | Association meetings are run according to parliamentary procedure.   |  |  |  |
| 14. | Association meetings are orderly, efficient, businesslike, and democratic.   |  |  |  |
| 15. | The leaders in my local are well-trained.  |  |  |  |
| 16. | The leaders in my local understand the responsibilities that accompany their positions.  |  |  |  |
| 17. | My local has a system in place for running local and region elections.   |  |  |  |

# Leadership Team

Knowledgeable, well-trained leadership team is critical in order to meet the needs of members. A full capacity local is led by a group of strong, committed leaders (including elected officers, appointed committee chairs) and MEA staff who work together to achieve the goals of the local organization.

These leaders are well educated, proactive and responsive to member needs. Key leadership positions are clearly identified and expectations are clear, shared and balanced. The leadership team is diverse and is willing and able to commit adequate time and energy to the goals of the local. The leadership team has a shared vision of the local organization along with a clear mission and a proactive long-range plan as well as short-term goals and priorities.

*Respond to the following statements by checking Yes (Y), Somewhat (S), No (N) or Don't Know (D)*

**Y S N D**

| 1.  | My local is led by a strong, committed group of elected and appointed leaders.                          |  |  |  |
|-----|---|--|--|--|
| 2.  | The leaders in my local work closely with our UniServ director.   |  |  |  |
| 3.  | The leadership team in my local is proactive.   |  |  |  |
| 4.  | The leadership team in my local is responsive to member needs.  |  |  |  |
| 5.  | The leadership team has a shared vision for our local.  |  |  |  |
| 6.  | Leaders in my local seek out, encourage, and mentor those with leadership potential.                    |  |  |  |
| 7.  | The leadership team has a clear understanding of the role and responsibilities of our UniServ director. |  |  |  |
| 8.  | The leadership team in my local regularly meets together as a group.                                    |  |  |  |
| 9.  | The leadership team in my local meets with those in other locals to exchange ideas and information.     |  |  |  |
| 10. | The leadership team in my local is well-trained.  |  |  |  |
| 11. | The leaders of my local have adequate time to fulfill their obligations to the organization.            |  |  |  |
| 12. | The leadership team in my local is diverse and representative of the members.                           |  |  |  |

# Long-Range Planning

Key to the success of any organization is the shared vision held by the leadership team. In a full capacity local, this vision is supported by a well- developed, meaningful long-range plan designed to help the local achieve its long- and short-term goals. Long-range planning and goal setting are driven by the results of member input from focus groups, needs assessments, satisfaction surveys, etc. There is meaningful involvement at all levels by leaders, staff and members.

There is a system in place for assessing and modifying the plan and the goals to ensure that they continue to represent the needs of the membership.

*Respond to the following statements by checking Yes (Y), Somewhat (S), No (N) or Don't Know (D)*

**Y S N D**

| 1.  | My local has a clear vision and mission.  |  |  |  |
|-----|---|--|--|--|
| 2.  | My local has a meaningful long-range plan.  |  |  |  |
| 3.  | My local sets yearly goals.   |  |  |  |
| 4.  | My local regularly assesses its progress toward meeting those goals.  |  |  |  |
| 5.  | Goal setting and long-range planning are driven by member input in my local.  |  |  |  |
| 6.  | My local regularly seeks member input by utilizing member focus groups, needs assessments, satisfaction surveys, etc. |  |  |  |
| 7.  | The leadership in my local has a good understanding of MEA/NEA goals and priorities.                                  |  |  |  |
| 8.  | The leadership and staff in my local have a good understanding of our local goals and priorities.                     |  |  |  |
| 9.  | My local has a long-range planning committee.   |  |  |  |
| 10. | The members in my local have knowledge of its mission, vision, and goals.   |  |  |  |
| 11. | The resources in my local are directed toward meeting our goals.  |  |  |  |

## New Members

Strong, relevant local depends on a steady influx of new energy and new ideas. A full capacity local recognizes this and has, as a part of its long-range plan, goals for the ongoing induction of new members. New members are provided with opportunities such as mentoring and induction, training and workshops designed to address their specific concerns, leadership opportunities, and organized social opportunities. There are ongoing opportunities for new members to provide feedback and voice concerns to the leadership team. New members are encouraged to get involved in meaningful association roles and are provided with the necessary training and information to ensure successful and continued involvement in the association.

*Respond to the following statements by checking Yes (Y), Somewhat (S), No (N) or Don't Know (D)*

|     |   | <b>Y</b> | <b>S</b> | <b>N</b> | <b>D</b> |
|-----|---|----------|----------|----------|----------|
| 1.  | My local recognizes and welcomes new members.   |          |          |          |          |
| 2.  | My local has a program specifically designed for the induction of new members.                            |          |          |          |          |
| 3.  | My local offers special workshops, social opportunities, etc., for new members.                           |          |          |          |          |
| 4.  | My local is involved with the district in the mentoring of new teachers.                                  |          |          |          |          |
| 5.  | My local provides materials to new members that are designed to meet their specific needs.                |          |          |          |          |
| 6.  | My local solicits the input of new members and encourages their feedback.                                 |          |          |          |          |
| 7.  | My local is involved with the student and intern teachers in the district.                                |          |          |          |          |
| 8.  | My local has a communications program targeted specifically at newer members.                             |          |          |          |          |
| 9.  | My local encourages new members to get actively involved in the association.                              |          |          |          |          |
| 10. | My local directs resources toward encouraging new members to get association training/attend conferences. |          |          |          |          |
| 11. | New members with leadership potential are encouraged and mentored by experienced leaders in my local.     |          |          |          |          |
| 12. | My local utilizes a variety of strategies for getting newer members involved.                             |          |          |          |          |

## Political Action/PAC

Every decision that impacts public school employees is made by an elected or appointed government official. In a full capacity local, political action is an ongoing and integral part of the local's long-range plan. There is a continuous commitment to community coalition building including joint ventures with district and community stakeholders. The leadership team and the executive director who serve the local are actively engaged in the political process at the local, state and national levels and assume that responsibility for keeping members accurately and regularly informed on all political issues of importance. The governance structure of the local includes a standing political action committee headed by an active, well-trained chairperson. The local is fully involved in activities such as yearly PAC drives, local screening and recommending committees, legislative council meetings and lobbying. The local leadership team members as well as the building representatives are well trained to carry out the political goals of the local/state associations at the building level.

Respond to the following statements by checking Yes (Y), Somewhat (S), No (N) or Don't Know (D)

Y S N D

|     |  | Y | S | N | D |
|-----|--|---|---|---|---|
| 1.  | My local has a standing political action committee.  |   |   |   |   |
| 2.  | The leadership team in my local is actively engaged in PAC and the political action process.                                 |   |   |   |   |
| 3.  | My UniServ director is actively engaged in PAC and the political action process.   |   |   |   |   |
| 4.  | Members in my local are regularly informed about local, state and national political issues.                                 |   |   |   |   |
| 5.  | Political action is a part of my local's long-range plan.  |   |   |   |   |
| 6.  | My local sets goals for member political action and involvement each year.   |   |   |   |   |
| 7.  | My local screens and recommends local candidates.  |   |   |   |   |
| 8.  | Members of my local participate in the screening and recommending process for state candidates.                              |   |   |   |   |
| 9.  | Members of my local participate in legislative council meetings.   |   |   |   |   |
| 10. | Members of my local are involved in lobbying activities.   |   |   |   |   |
| 11. | Political action is a regular part of my local's meeting agendas.  |   |   |   |   |
| 12. | My local has a PAC drive every year.   |   |   |   |   |
| 13. | The PAC drive in my local is a planned, organized event.   |   |   |   |   |
| 14. | Political activity and PAC are important in my local.  |   |   |   |   |
| 15. | Our assigned MEA lobbyist communicates regularly with our UniServ director and local leaders.                                |   |   |   |   |
| 16. | My local is involved with others in the district and community to form coalitions around political issues of mutual concern. |   |   |   |   |
| 17. | Members of my local are encouraged to get involved in political actions.   |   |   |   |   |
| 18. | Members of my local are recognized for their political involvement.  |   |   |   |   |