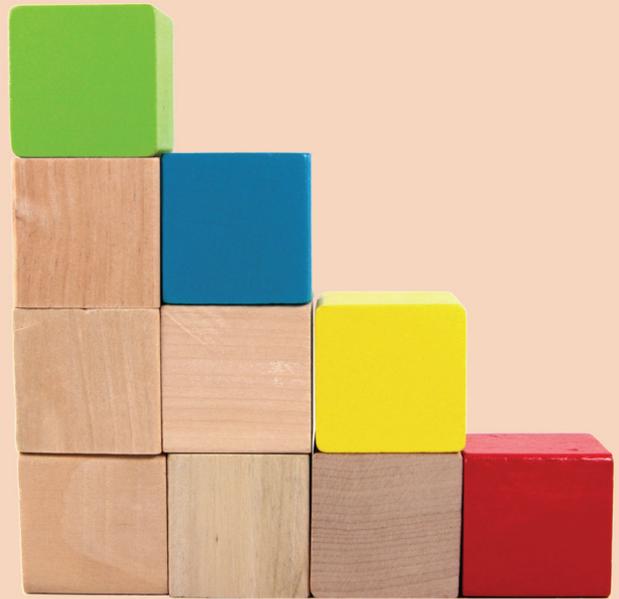
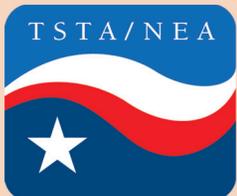


BUILDING FULL CAPACITY LOCALS



Organizational Effectiveness Model for TSTA Local Associations



PREPARED BY: TSTA ORGANIZING CENTER FOR AFFILIATE AND LEADERSHIP DEVELOPMENT

The Power Profile

The TSTA has been a leading force in the improvement of public education in our state for more than 125 years. Our mission, to ensure that the education of our students and working environments of our members are of the highest quality, is carried out every day across the state by our local associations. It should be clear to everyone that strong locals make for a strong TSTA.

Over the past few years, the many challenges that we have had to face have prevented us from focusing our efforts on local development. We are targeting our efforts and our resources toward helping every committed local in the state develop into a full capacity local—one that is **powerful**, relevant, and **has the capacity to be influential in its community**. We know that strong local associations have the greatest positive impact on TSTA members. Our focus on building and strengthening local associations is now more important than ever before.

What does a **powerful**, full capacity local look like? How is it built and supported? These were the guiding questions we sought to answer during many months of conversations with local presidents, leaders, and staff across the state. The **Power Profile** is the product of those discussions. It is a prototype that defines the essential components of a full capacity local. It is a model that staff, local presidents and future leaders can use to measure both the strengths and the opportunities for improvement in their own locals.

The **Power Profile** highlights nine indicators of a full capacity local that are critical for a local's success—advocacy; communications; a culture of membership; a finance system; internal and external governance; leadership development; association representatives; and political action. The components necessary to achieve full capacity status in each area are listed. The key to success is using the Power Profile to engage in long-range planning

There is still much to be done, but the end result should see more members actively involved at the local level, which will, in turn, strengthen local affiliates and our state association.

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. This document has been developed to provide assistance to local leaders and staff in the planning process. Building an effective long-range plan is essential to becoming a full-capacity local.

The Local Power Profile is a tool for leaders to use in long-range planning. An assessment of your local using the power profile will identify which components of the nine indicators need to be addressed in your local's plan. An objective review every year will show the progress the local is making toward becoming a powerful, full-capacity local.

Building full capacity locals around the state will be an ongoing and evolutionary process. The goal is to get every local in the state to participate in increasing its capacity to at least some extent.

Instructions for Using the Power Profile

Ideally, a TSTA professional staff person would assist you in the beginning stages of dialogue about the current reality in your local association. However, that isn't absolutely necessary in order to follow a few steps to assess your local and then create a plan based on the assessment. Following the steps outlined below will lead you and your local through a simple process of assessment and planning that can produce a plan for achieving greater power. Do not try to tackle too much in the beginning—the goal is continuous improvement over time.

The assessment is divided into categories or indicators, each with a list of items that reflect what a local association should be doing at various levels of development. The numbers beside each item reflect a continuum for determining the level of local association development in each category. There are seven levels for local association development, but not all categories have all seven levels. Keep in mind that some locals may never be able to achieve the level seven status of exclusive consultation. Each local has complete autonomy to decide how best to grow and develop and plan accordingly.

Step 1:

The local president and executive board (or group of Association representatives, or group of dedicated members) should meet for the purpose of reviewing the power profile. At the meeting, the group should go through the power profile indicators (categories) and items to determine whether or not the local can say "Yes, we do this." for each item listed in each category. For each of the yeses, check the box beside the item. Leave the other items unchecked.

Step 2:

Review the items checked and discuss what each of those items represents in accomplishment to your local association. In your discussion, identify what could be improved.

Step 3:

Now focus on the items that are not checked. The first item not checked in the assessment is the first thing to consider placing in your plan for progress and power. Ask yourselves this question: "Of the items we are unable to check in this assessment, which 2 or 3, if checked, would most likely create additional power and success for our local association?" The answer is the beginning of your local plan.

Step 4:

Write down those items identified in step 3 on paper. You can use the sample template or create a format of your own. Identify specific activities that you will need to do, who will be responsible for each activity, a timeline for completion, and any cost that might be incurred. Keep in mind the following truism: If you don't write it down, it isn't a plan. Review what you've written down—do you want to add something else or is this

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enough for now? Revisit the discussion about how well you are doing what you already do. You will want to identify in your plan the areas targeted for improvement. Include in your plan any activities you are currently doing that you want to continue doing so that you will be able to assess those activities later. Polish the plan and provide a copy to each member of the planning team.

Step 5:

Share your plan! You will want to make sure your members, association reps, and potential members know that you plan to grow and become powerful and influential as an association. Solicit input from your members. The more your members buy into the plan, the more they will want to participate and become engaged in the local association activity.

Step 6:

Review your plan throughout the year with your executive board and/or AR's. Document the completion of the activities and comment on the plan document about the success or not of each activity. Use your reflections as ongoing input for the plan and its evolution. Revise as needed. At the end of the year you will have all the documentation to reassess and modify your plan for the next year.

Step 7:

Submit your plan and assessment to TSTA by sharing it with the TSTA field staff or submitting it directly by email to brendap@tsta.org.

CONGRATULATIONS! You are on your way to becoming a growing, thriving, and a more powerful local association. Be sure to celebrate your successes along the way.

Here's what president of North Lamar Education Association had to say about the process:

"The idea of more paper work turned me off. However, when I sat down and began comparing the actions of my local with the statements listed in the Power Profile, I suddenly realized my local was 'powerful!' We already were doing most of what was described and what we weren't doing only helped us focus and take action on what we needed to do in order to better serve our members! I encourage all local leaders to evaluate their local by the statements listed in this profile--there is very little paper work (it's a check list actually) and a world of reinforcement and encouragement involved."

Stephen Smallwood

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FULL-CAPACITY PROFILE FOR TSTA LOCAL ASSOCIATIONS

Name of Local _____ Region _____

School District(s) _____

Members, as of _____

Active _____ ESP _____ Life _____ Total _____

Potential in 05-06:

Market Share:

Teachers _____ ESP _____ Total _____ Teachers _____ ESP _____ Total _____

Compliance: Constitution/Bylaws on file _____ Yes _____ No _____

05-06 partial _____ full _____ 04-05 partial _____ full _____ 03-04 partial _____ full _____ 02-03 partial _____ full _____

Number of Buildings in District _____ Local Dues Amount _____

ARs:

Number _____ Members per AR _____

Continuing Contributors:

Number _____ Percent of Members _____ Total Contributions _____ Per memb _____

On the following pages you will find a list of local expectations in nine (9) different categories called indicators. In each category, place a checkmark in front of each numbered item that is true of this local. Summarize below.

	Highest Marked	Lowest Unmarked	Total Marked	out of	Total Number
Advocacy	_____	_____	_____		<u>17</u>
Communications	_____	_____	_____		<u>13</u>
Membership	_____	_____	_____		<u>19</u>
Finance	_____	_____	_____		<u>14</u>
Internal Gov	_____	_____	_____		<u>24</u>
External Gov	_____	_____	_____		<u>18</u>
AR	_____	_____	_____		<u>9</u>
LD	_____	_____	_____		<u>13</u>
Pol	_____	_____	_____		<u>15</u>

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Advocacy: Exclusive Consultation and Member Defense

Advocacy in exclusive consultation and grievance processing, 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 professional unionism as well as knowledge of the local's history. Association leaders are well-educated in the areas of exclusive consultation, advocacy and labor laws and receive ongoing training and updated information. The local's long-range plan addresses exclusive consultation goals as well as plans for ongoing grievance representation and awareness. Local leaders have a good, working understanding of the local school board policies.

Indicator 1

Advocacy: Member Representation, Exclusive Consultation

1	Members are referred to the Help Center
2	Some attempt is made to ensure that members are aware of Help Center unless Local is handling member representation
2	The local president or designee attends some School Board meetings
3	Someone in the local regularly attends School Board meetings
3	This local makes annual salary presentations to the School Board
3	The Local provides representation of some members, working with Help Center, unless Local is handling member representation
4	This local makes presentations to the Board on issues other than salary
4	The president or designee meets occasionally with administration
4	This local has established a cadre/committee to be trained for representing members (unless Local is handling member representation)
5	The president or designee meets regularly with administration
5	This local has the ability to influence some Board decisions
5	This local has a trained cadre/committee representing members on most issues, using the Help Center as consultants, unless Local is handling member representation
6	This local handles member representations until a Lawyer is required
6	This local develops and implements plans to lobby/influence Board and administration
6	This local has proposed a local consultation policy to the Board
7	This local has secured an Exclusive Consultation policy in the district
7	This local is recognized as the Exclusive Consultant

Communications

A 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 especially message development. Member communication is ongoing, frequent and in 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.

Indicator 2 Communications (Internal and External)

2	This local has at least some communication with members
3	This local communicates with members occasionally
3	This local has occasional contact with local media – if only letters to editor
4	This local regularly communicates with members
4	This local has a communications committee to handle the local communications plan
4	This local has well developed local media relationships
4	This local plans and conducts member social functions
5	This local utilizes email as a communications tool
5	The local plan includes good internal communications plan and at least rudiments of external media plan
6	This local has the ability to communicate with members and get a response – move members to action
6	This local engages in Community outreach and involvement
6	The Local plan includes complete external media plan
7	This local is recognized in the community as a leader in Education

Culture of Membership

A 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.

Indicator 3 Culture of Membership

2	The local distributes TSTA/NEA materials to members
2	The local recruits new members at a New-Employee orientation hosted by the district
3	The local recognizes and welcomes new employees to the district
3	The local directs resources toward membership recruitment
3	The local has a Membership chair/committee in place
3	The local provides an association sponsored professional development opportunity to new members at least once per year
3	The local includes new members on committees
3	The local recognizes/thanks members at least once per year
3	The local recognizes publicly the accomplishments of members
3	The local ensures that members are aware of the NEA/TSTA Member Benefits opportunities
4	The local communicates with new employees prior to the beginning of the year
4	The local has a complete membership recruitment/retention plan
4	ARs in this local recruit new members at their work sites
4	The local provides materials/packets to all new members
5	The local has a process for ensuring that all potential members are asked to join
5	The local provides association member "mentors" for new members
6	The local conducts new member orientations for new members
6	The local operates in "campaign mode" during either the fall or spring campaign
7	The local operates in "campaign mode" during both the fall and spring campaigns

Financial 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.

Indicator 3: Finance, Local dues and Budget (Finance)

	2	This local charges local dues
	2	This local operates with a local budget
	2	A leader other than person with check book reviews finances in this local
	3	Local dues in this local are above \$10
	3	Regular financial statements/Treasurer's Report are presented to Board
	3	The Budget is reviewed/approved by the Board or other governance body
	4	Local dues are above \$25
	4	The Treasurer attends TSTA Business Center training for Treasurers
	4	This local's financial reports based on the local budget
	5	Local dues are \$50 or more
	5	The local's Budget is tied to the local plan
	5	Financial reports are based on the budget and tied to plan
	6	An Audit committee reviews and approves the local's finances
	6	Local dues are sufficient to fund the local plan, preferably tied to average salary

Governance: Internal and External

For a democratic organization to run efficiently, fundamental governance structural requirements need to be in place. In a full capacity local, these include regularly updated 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.

Indicator 5 Internal Governance

1	This local has a President or Contact Person
1	This local has a current Constitution or Bylaws
1	This local files Compliance documents partially or occasionally
2	This local files all Compliance documents at least half the time
2	This local elects officers beyond President or Contact
2	This local holds some Board or group meetings
2	This local makes some attempt to seek input from other members
3	This local's constitution has been updated/reviewed within the last 5 years
3	This local holds regular Board meetings
3	This local has a regular election of officers with full slate of officers
3	This local is in full compliance most years
3	This local has a Membership chair/committee in place
3	This local seeks diversity (ethnicity and job categories) of involvement in governance
3	Some elements of local planning, including some assessment of member needs exist in this local
4	Leaders in this local have a good understanding of the constitution/by-laws
4	Leaders in this local understand the responsibilities that accompany their positions
4	This local engages in a planning process, with staff assistance, based on regular assessment of members' needs
4	This local has a complete membership recruitment plan
4	This local plans and strives for diversity (ethnicity and job categories) in the Governance structure. Job categories means not just ESPs and Actives, but bus drivers, custodians, etc. and librarians, nurses, counselors, etc.
4	This local is in full Compliance every year
5	This local maintains a solid local plan, developed through a process that includes regular assessment of members' needs and staff assistance
5	This local effectively uses committees and or/task forces
6	This local ensures and achieves diversity (ethnicity and job categories) in Governance structure
6	This local achieves its goals

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Governance: Internal and External

Indicator 6 External Governance

1	This local attends a Regional BoD at least once a year
2	This local sends an occasional Delegate to Regional and/or TSTA HoD
3	This local regularly attends Regional BoD meetings, training & other activities
3	At least one person from this local attends TSTA Educational Issues Conference
3	This local elects Delegate(s) to Regional HoD every year
3	This local elects Delegate(s) to TSTA HoD every year
4	This local recommends members to the state President for appointment to statewide committees
4	This local hosts an occasional TSTA/NEA training/workshop for local members or attends at regional training/workshop
4	More than one person from this local attends TSTA Educational Issues Conference
4	This local sends at least one new person each year to at TSTA conference
4	This local elects a full delegation to Regional HoD and TSTA HoD, most attend
4	This local elects a Delegate(s) occasionally to NEA RA, if eligible for local delegate(s), or through a Local Cluster
5	This local hosts at least one TSTA/NEA training/workshop a year for local members
5	This local sends a full delegation to Regional, TSTA HoDs
5	This local sends attendees occasionally to NEA Conferences, e.g. Western Region Leadership Conference, National ESP Conference
5	This local elects a full delegation to NEA RA, most attend
6	This local sends a full delegation to NEA RA

Leadership Development

A 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 and appointed committee chairs) and TSTA 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.

Indicator 8 Leadership Development/Training

2	At least one person occasionally attends TSTA/AOT Leadership Training for leadership skills
3	At least one person attends TSTA/AOT Training Conference when offered, others at least occasionally
3	This local nominates at least one local member for Ambassador Academy
4	More than one person attends TSTA/AOT Leadership Conference when offered
4	This local conducts occasional local leadership training
4	The local plan includes some element of identifying and involving potential leaders
5	Officers and others attend the TSTA/AOT Leadership Training when offered
5	Emerging leaders attend appropriate leadership training yearly, e.g., Ambassador Academy
5	The local actively recruits new leaders into active participation in local governance, paying attention to diversity of ethnicity and job category
5	There is training in the local at least every other year for leaders/potential leaders
6	This local hosts at least two TSTA/NEA training workshops a year for local members, either alone or with neighboring locals
6	All officers have been through leadership training
6	The local plan includes elements to ensure active participation of new leaders in local governance, paying attention to diversity of ethnicity and job category
7	The local conducts a retreat/training/planning session for leaders every year

Association Representatives

Knowledgeable, well-trained Association Representatives (AR's) are essential to the growth and development of the local association. In a full-capacity local, AR's are the "face" of the Association in the work site. The AR is often the first exposure to the Association for new employees. AR's are the recruiters, advocates, and communicators at the site level for the Association. Full-capacity locals ensure that all work-sites have AR's who are leaders, well-informed, and well-trained to fulfill the appropriate responsibilities.

Indicator 7 AR Structure

	2	This local has some ARs, if more than two buildings
	3	Depending on number of buildings, this local has enough ARs to warrant AR meetings, some training
	4	This local has ARs in half of buildings, some trained, occasional AR meetings
	4	This local recognizes and/or rewards ARs
	5	This local has trained ARs in at least half the buildings, regular AR meetings
	5	The local plan includes recruitment, training of ARs, with training offered annually
	6	This local has trained ARs in at least three-fourths of buildings
	6	The local holds AR training/orientation every year with majority of ARs attending
	7	This local has trained ARs in all buildings, extras at ratio of 1 for 25 members, with appropriate attention paid to including various constituencies – e.g., different job categories of ESPs and non-classroom teacher professionals

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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 TSTA staff who work with the local are actively engaged in the political process at the local, state and national levels and assume the 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 the TSTA Continuing Contributor PAC drives, local screening and recommending committees, 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.

Indicator 9 Political Involvement

	2	At least some members in this local respond to TSTA requests for legislative contact
	3	At least one member in the local attends some TSTA political/legislative training
	3	The local has some participants in the legislative interview process
	4	The local engages in some School Board election involvement – sponsors forums or meets with candidates
	4	Members respond regularly to TSTA requests for Legislative contact and for Legislative Cadre members
	4	There is some response to TSTA requests for political involvement/campaigning
	4	The local occasionally solicits continuing contributors for TSTA-PAC
	5	The local is regularly represented at TSTA political/legislative training
	5	The local has an established interview process for School Board races, recommendation/endorsement, and does some campaigning
	5	There is some local involvement/success in local and legislative elections (beyond response to TSTA efforts)
	5	The local solicits continuing contributors for TSTA-PAC at least annually
	6	The local plan includes regular solicitation of continuing contributors for TSTA-PAC
	6	Local members are involved through the Local in legislative campaigns
	6	The local is fully involved in School Board races/candidates seek support of Local
	7	The local identifies, recruits and elects school board candidates