

## **Frequently Asked Questions TSTA Full Capacity Local Documents**

### **When are our Full Capacity Local Documents Due?**

August 1 of each year, per the TSTA Bylaws.

### **Local Profile**

#### **Why do a Profile?**

Your local does a Profile to assess where you are currently. An accurate self-assessment is the starting point for developing a comprehensive strategic plan. If you don't know where you are, it's going to be hard to create a plan for where you want to go. The Profile helps to get the local leadership team to focus on assessing capacity, strengths, areas for growth/improvement.

#### **Who should be involved in doing the profile?**

You should involve your local officers and your Executive Board (or its equivalent) at a minimum. Input from your ARs, your committee chairs, and/or other key leaders and activists can be very helpful, as well.

#### **What is the Compliance Committee looking for when they look at the profile?**

First and foremost, Committee is looking for honest self-assessment. The profile is not a test. The number of "positive" responses are not counted up and scored. Exaggerating your local's capacity on the Profile can have negative effects. It can lead to an unrealistic Plan, and the Committee may have access to hard data on your local (membership numbers, AR counts, etc.) that they can check against the Profile. The Compliance Committee looks for a connection between your Profile and your Plan. Does your Plan utilize the strengths and meet the needs identified in your Profile?

### **Local Plan**

#### **Why are the quantifiable goals important?**

Setting quantifiable goals and then measuring progress toward those goals allows the local to assess progress in important areas in an objective manner. It allows local to look objectively at what did and did not work. That, in turn, allows local to adjust strategy and tactics during the year and when making the plan for the next year.

#### **What happens if we don't meet our goals?**

The Compliance Committee does not penalize a local for not meeting an ambitious goal. The Committee would look to see if the local reflected on why they did not meet a goal and what they might do differently for the next year in order to meet the goal. The Committee recommends that locals be aspirational in their goals while also being realistic.

#### **How many projects/tactics/activities do we need to have?**

There is not a magic number. It's more valuable to have a smaller number of well-planned activities than to have a lot of poorly planned activities.

#### **Why is it important to be specific with the When, Who, Cost questions?**

You don't really have a Plan without these details. Designating specific people who will take primary responsibility for an activity or project will increase the likelihood that it will happen. If nobody or everybody is responsible for an activity or project, it very well may not happen. ("I thought you were doing it." "Nobody told me I was supposed to . . .")

Having at least a basic timeline for an activity or project is vital. You may not have finalized that the activity will be on April 4 but you want to determine at least a general time frame within which it will occur (early April, for example). *The Committee is generally skeptical of “ongoing” or “as needed” as a response to When.*

Estimating the cost of activities provides a check for you on whether your plan is realistic. Will you have the resources needed to execute your activity? Looking at the “TOTAL COST” for each area allows you to see whether the needs you identified in the profile are prioritized in your resource allocation.

**How often should we evaluate how we’re doing on our Plan?**

Plans should be flexible working documents, not forms that get filled out once a year and then forgotten until the next due date. You should do a thorough evaluation and adjustment of the entire Plan at least a couple of times a year. Ongoing evaluation of your Plan makes the final reflection and the creation of next year’s Profile and Plan easier.

**How can we make sure that happens?**

Your local should set up a regular way of monitoring outcomes and adjusting strategy and tactics throughout the year. The packet of supporting materials for the Compliance process, available in “Tools for Leaders” on the TSTA website, includes a template, in Excel format, of a worksheet you can use to keep track of progress on your Plan. It will be important to have regular, planned communication between the local leaders and people responsible for carrying out the plan. Consider having a “point person” for the different major areas. When you develop your local schedule or calendar at the beginning of the year, schedule at least two dates over the course of the year when your leadership team can get together to check in on Plan progress and discuss outcomes and adjustments.