

INSTRUCTIONS FOR COMPLETING YOUR FULL-CAPACITY LOCAL DOCUMENTS

INTRODUCTION

TSTA and our locals organize for power, for the capacity to make things happen. Strong locals are the key to realizing TSTA's Mission and Vision. Building powerful, engaged locals is the single most important element of TSTA's Strategic Plan, and our locals are the foundation of our grassroots organizing effort. Strong locals make a strong TSTA and are the key to ensuring a great public school for every student.

TSTA targets our efforts and our resources toward helping every committed local in the state develop into a full-capacity local. What does a powerful, full-capacity local look like? How is it built and supported? These are the guiding questions we continually seek to answer.

The Full-Capacity Local Documents are the product of those discussions. Taken together they are an evolving tool that defines the essential components of a full-capacity local. It is a model that local leadership and future leaders can use to measure the strengths and the opportunities for improvement in their own locals, and then to plan for how to take advantage of those opportunities.

Accessing and Using the Documents

- Your local president should receive a series of nine emails from *localplanning@tsta.org* via *surveymonkey.com* that include links to an online Survey Monkey version of the Full Capacity Local Documents. There will be one email for each of the nine topics or areas covered by the assessment and planning process. These are *Issue Organizing and Membership; Campus/Worksite Leadership; Leadership Development; Communications; Political Action; Advocacy; Internal Governance; Business Systems; and External Governance.*
- In order to qualify for Full Capacity status, your local must complete all nine sections. To qualify for Active status, your local must complete the first two sections, *Issue Organizing and Membership* and *Campus/Worksite Leadership.*
- In order to complete a section, simply click on the "OPEN" button, which will take you to the survey page for the subject area you've chosen. Step one will be to enter your name, local, and email address, then you'll use the navigation buttons at the bottom of each page to move forward and back within the document.
- As you are working, you can save your work on that section by clicking on the button labeled "NEXT" at the bottom of each page. At the end of the entire survey click on the button labeled "SUBMIT" to send your responses to TSTA.
- At any time before August 1 you may revisit your survey responses and alter them by simply re-entering the survey through the same email you originally received. *On August 1st the ability to revise an already existing survey will be turned off and revision will no longer be possible until after the Compliance Committee has met to evaluate the Full Capacity Local Documents. After that Committee meeting the "revision" feature will be turned back on.*

- The Power Profile highlights indicators of a full-capacity local that are critical for a local's success. 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.

THE FULL-CAPACITY ASSESSMENT AND PLANNING PROCESS

Key to the success of any organization is the vision shared by its leadership team and members. 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 must begin with and be driven by systematic, intentional, structured listening to our members. This listening can take the form of member input from focus groups, needs assessments, satisfaction surveys, etc. However, there is no substitute for face-to-face conversation in listening to, and empowering our members.

The basic method for using this tool to build a powerful local is 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.

INSTRUCTIONS FOR COMPLETING THE PROFILE PORTION OF EACH DOCUMENT

The assessment or Profile section under each indicator contains a list of items that reflect what a local association should be doing at various levels of development. Keep in mind that this is an assessment on which to base your local Plan. *It is not a standardized test on which the local's capacity will be judged by the Committee.* The Committee will be most interested in whether the self-assessment is honest, accurate, and connected to the local's Plan. Overstating the local's accomplishments or capacity will not increase the likelihood of a high rating on the overall documents.

Here are some steps to creating an accurate and useful Profile:

- Listen to your members. All good organizing begins with intentional listening. Make an concentrated effort for local leaders and ARs to have conversations with members in their workplaces about the local; how things are going, what they'd like to see the union doing, what they'd change or improve in how the local does its work.
- The local president and executive board (or group of Association Representatives, , group of dedicated members, local organizing committee, etc.) should meet, with the assistance of TSTA field staff, for the purpose of reviewing the Profile. Step 3:
- At the meeting, the group should go through the power profile indicators 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. It's important to remember that this Profile is a measure of the activity and capacity of the local association, not just a record of "what happens" in the district whether the local actively makes it happen or not. It's a record of what you do, not just of things that happen to you regardless of your level of activity.

- Review the items checked and discuss how each of those items can contribute to the accomplishment of the local's goals. In your discussion, identify what could be improved.
- Now focus on the items that are not checked. Ask yourselves these questions: "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?" "Which unchecked items do we need to have in place first, as steps to being able to check the more ambitious items?" The answer is the beginning of your local plan.

THE LOCAL PLAN

When completing the Plan portion for each subject area, please remember to do the following:

- Complete the Profile first. Use the areas of strength and opportunities for growth that you identify to guide your planning priorities.
- Involve a representative group of members and leaders in the planning. The more people that feel a sense of ownership of your Plan, the more help you're likely to have in carrying it out.
- Use the "Quantifiable Goals" section of each page to set realistic, concrete, measurable goals for your local. Plans without quantifiable goals are unlikely to be approved by the Compliance Committee.
- Be specific. In the "When" column, for example, list dates or ranges of dates. Avoid generic references to "ongoing". In the "Who" column, list names of people, not just descriptions of groups such as "staff and leaders".)
- Use the "Total Cost" cells to create an expenditure budget for your Plan. Blank "Cost" cells on the template may suggest that the local doesn't prioritize something highly enough to commit or try to find resources to make it happen.
- Be sure to submit each of your completed documents by clicking on the "Submit" tab at the end of each subject area survey.
- 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. Circulate the plan to your ARs and Campus Leaders. Ask their help in soliciting 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.
- Review your plan throughout the year with your executive board and/or ARs. Using the Progress Worksheet available as supporting material, document completion of the activities and comment about the success or not of each activity. 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 and to report on your local's progress for compliance purposes.