**WEAC LOCAL SELF-ASSESSMENT TOOL**



**LOCAL INFORMATION:**

**Name of Local: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Type of Local: K-12 \_\_\_ ESP\_\_\_ Tech College \_\_\_**

**Local President: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Local Assessment Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Local Assessment Team Members:**

**Local Membership Numbers: \_\_\_\_\_\_\_\_\_\_\_\_ Total Membership: \_\_\_\_\_\_\_\_\_\_\_**

**Review of Initial Local Assessment**:

**Follow-up Strategic Planning Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Signature:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Member Submitting**

**Please return this page, along with page 10, to WEAC by emailing to carusoa@weac.org**

**INDICATOR: ADVOCACY: OVERALL**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **RANK** | 1. **RELATIONSHIP WITH DISTRICT ADMINISTRATION**
 | 1. **COLLECTIVE POWER**
 | 1. **COMMUNITY ENGAGEMENT**
 | 1. **MEMBER ENGAGEMENT**
 | 1. **SOCIAL AND RACIAL JUSTICE**
 |
| **1.** | Local president meets with district administration only when there is an issue that he or she feels needs to be addressed | Members do not have a good sense of what it means to build power and influence or are not engaged with their local | The local does not have a strong presence or is not known or respected in the community | Members belong to the local but are not engaged or active. A small group of leaders perform most of the work | The local has not gotten around to social and racial justice initiatives and has not researched impact on educational practice, policy and the profession. |
| **2.** | The local president meets with the human resources director on a monthly basis in order to resolve any issues | The local’s leadership works with the association representatives (AR’s) to promote some basic organizing concepts and strategies | The local has some presence in their community and has organized a few community service activities | Members are aware of some issues- when the local leaders bring them to their attention. Members are seldom involved in the decision-making process | The local understands social and racial justice initiatives from review of research and discusses the impact on educational practice, policy, and the profession. |
| **3.** | The local’s leadership and a member-committee meet on a monthly basis with the human resources director and/or Superintendent | Association reps have been trained to understand the concept of engaging members and building power; they look for opportunities to use power | The local is known in the community and takes part in some community outreach, engagement as activities to build support | The local seeks regular input from current and new members and encourage members to get involved in local activities, committees and the political process | The local designs advocacy plans and strategies from social and racial justice research that impacts educational practices, policies and the profession.  |
| **4.** | The local has a strong Labor Management Committee (officers and members) that meet on a monthly basis with district administration | The local organizes its members around vital issues, whether they are contractual or not. By doing so, they leverage their power and influence | The local has developed a very strong community outreach program and continually conducts community power studies and has developed strong relationships with community partners | The local intentionally engages members at many different levels of the association and targets new leaders for vital positions and committees  | The local forms alliances with a diverse set of stakeholders to implement social and racial justice initiatives.  |
| **5.** | The local partners with the district and members are seated on various district committees where their input is valued and opinions appreciated | The local is highly respected within the district and educational community. Members are ready to organize and mobilize around vital issues  | The local is supported and highly respected in the community. They have built strong relationships over time and are always ready to mobilize  | The local is member-driven and is actively engaged at every level in the association. Members are advocates and can mobilize around critical issues | The local analyzes and strengthens alliances with a diverse set of stakeholders to implement, support, evaluate and communicate social and racial justice initiatives. |

**Score A:\_\_\_\_\_\_+ Score B:\_\_\_\_\_\_ + Score C:\_\_\_\_\_\_ + Score D:\_\_\_\_\_ + Score E:\_\_\_\_\_ = Total Score:\_\_\_\_\_ ÷ 5 = \_\_\_\_\_**

**INDICATOR: ADVOCACY: POLITICAL ACTION**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **RANK** | 1. **MEMBER EDUCATION & ENGAGEMENT**
 | 1. **ISSUE, LEGISLATIVE & CANDIDATE CAMPAIGNS**
 | 1. **LEGISLATIVE ADVOCACY/FCPE**
 | 1. **MEMBER ORGANIZING & MOBILIZATION**
 | 1. **LOCAL BOE AND LOCAL POLITICS**
 |
| **1.** | The local believes that it is the responsibility of individual members to get involved in the electoral process and that the local should not fill this role | The local makes no effort to recruit members to work on recommended national, state or local candidates | The local has no political action committee and no members that participate in Fund for Children & Public Education (FCPE) | The local has not organized its members around local political issues, legislation or in the community  | The local has no real connection with the local BOE nor participates in local politics |
| **2.** | The local president is very active in local and state politics but tends to “go it alone” without any member engagement | The local informs members of NEA, WEAC, and local candidate voting issues and recommendations. A small core of members participate in the electoral process | The local president and a few of the local’s members are actively engaged in the political process at the local and state levels with FCPE | The local president or officers have some limited influence with BOE members, legislators, and community leaders | The local president handles all of the local’s politics. There are some established relationships with BOE members and community leaders |
| **3.** | The leadership of the local is actively involved in most aspects of the political process. They understand power connections. A few members actively participate  | The local solicits (with the help of their state organization), and trains its members to work on political campaigns | The local leadership stresses the importance of political involvement and FCPE contributions to increase participation and power | Member lobbying activities happen only for political races and ballot measures | Local officers/political committee meet regularly to discuss legislative and BOE action items to share with members |
| **4.** | The local has a thriving political education program that engages a majority of its members | The local’s political committee recruits members to actively participate in targeted political campaigns and issues. Members understand the value of their engagement and involvement | A majority of the local’s members are active and advocate on educational issues that impact their profession and student achievement | The local members have formed political coalitions in the community and meet regularly with legislators | The local organizes its members politically and recruits, screens and interviews, and recommends favorable candidates for BOE, etc. |
| **5.** | The local partners with WEAC and member trainers to educate, inform, engage and activate all its members in order to provide a strong impact on political races | Members work together to GOTV for legislative races, staff telephone banks, walk precincts and assist in sending out targeted political mailings | The local leads the way in FCPE contributions and participates in legislative lobbying at all levels. Members are actively engaged in the process | The local membership is organized, active, powerful and ready to mobilize. Their relationships are strong and influence is great | The local is a strong political powerhouse in the community and has the ability to elect pro-education candidates |

**Score A:\_\_\_\_\_\_+ Score B:\_\_\_\_\_\_ + Score C:\_\_\_\_\_\_ + Score D:\_\_\_\_\_ + Score E:\_\_\_\_\_ = Total Score:\_\_\_\_\_ ÷ 5 = \_\_\_\_\_**

**INDICATOR: ORGANIZING: MEMBER**

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| --- | --- | --- | --- | --- | --- |
| **RANK** | 1. **MEMBER ORGANIZING AND NEW MEMBER RECRUITMENT**
 | 1. **MEMBER TRAINING AND EDUCATION**
 | 1. **RECRUITING POTENTIAL MEMBERS**
 | 1. **DATA COLLECTION, ANALYSIS AND STRATEGIC PLANS**
 | 1. **MEMBER EDUCATION**
 |
| **1.** | The local distributes membership materials to new hires at the beginning of every school year but has a limited presence at the new employee orientation | The local depends on their Region or Urban for most of their member training needs | The local does a one-time membership “pitch” every year to potential members | The local rarely collects or analyzes data unless it’s for contract negotiations. It does not regularly plan but rather is reactive in nature | Members do not have a good understanding of their benefits |
| **2.** | The local leadership has a presence at the new employee orientation. A team distributes membership materials and promotional items to new employees | The local provides training materials to members. It sends some selected members to local trainings and workshops | The local attempts to recruit potential members, when they can dedicate time. Attempts in the past have not been very fruitful  | The local uses some data to track members and potential members at different work sites as well as for contract negotiations. Planning occurs when issues arise | Leaders and some members have a good understanding of their benefits |
| **3.** | The local partners with district administration for new employee outreach/orientation. They meet them separately (luncheon, breakfast, etc.). Local leaders and association representatives reach all new members via a plan | The local provides opportunities for members to get involved by sending members to WEAC and National conferences. Some local trainings are provided by leadership | The local leadership routinely asks that Association Representatives actively recruit potential members at their buildings and worksites with varied success | The local has one or two members that track member/district data for member organizing and in negotiations. The local has a static plan that doesn’t change much from one year to the next | The local sends their self-identified leaders to advocacy-based trainings and conferences once or twice a year |
| **4.** | Local leaders/Reps have developed a good internal organizing/recruitment plan in which all participate. The plan nets between 80-90% of new employees each year | The local is intentional about providing member driven (year-long) training opportunities for all of its members | The local has an organizing/member recruitment committee that targets and engages potential members on a yearly basis | The local has a “data repository” in order to analyze critical information for important decisions. The local has a yearly, member-focused strategic plan | The local creates training opportunities for all of its members. Most members know the local’s history and struggles and possess a shared understanding of collective power |
| **5.** | The local has a highly successful organizing, recruitment and new member engagement program that targets all member groups | The local has a strong member training program and partners with WEAC/district leaders for professional development, etc. | The local has a strong member organizing and recruitment program that targets potential members for one on one conversations and strong engagement | The local’s database is vital to its strategic planning capabilities and creates a flexible yearly plan with goals, outcomes, strategies, timelines and tactics | The local has a strong advocacy training program for leaders, association representatives, and rank and file members |

**Score A:\_\_\_\_\_\_+ Score B:\_\_\_\_\_\_ + Score C:\_\_\_\_\_\_ + Score D:\_\_\_\_\_ + Score E:\_\_\_\_\_ = Total Score:\_\_\_\_\_ ÷ 5 = \_\_\_\_\_**

**INDICATOR: ORGANIZING: COMMUNITY**

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| --- | --- | --- | --- | --- | --- |
| **RANK** | 1. **COMMUNITY ISSUES**
 | 1. **COMMUNITY GROUPS & COALITIONS**
 | 1. **SCHOOL BOARD ENGAGEMENT**
 | 1. **LABOR SOLIDARITY**
 | 1. **COLLECTIVE POWER COMMUNITY SUPPORT**
 |
| **1.** | The local has no connection to the community they work in nor do they concern themselves with community issues | The local does not have a strong connection with parent groups and other coalitions in the community | The local is not very involved at the school board level and does not regularly attend Board meetings | The local has not built any solid alliances with the labor community | The local does not have a community outreach plan and members are unaware of events in the community in which they work |
| **2.** | The local has a few connections and contacts in the community and has asked for support during crisis situations in the past. They support a few causes | The local only contacts parents and other community groups in a time of crisis/need | The local president attends school board meetings but does not have much power or an impact on the decision-making process | The local only contacts other labor unions when in crisis or has a looming labor dispute on its hands | The local has made some key alliances in the community but does not meet with them on a regular basis |
| **3.** | The local has a small group of members/President that have/has made some good contacts in the community and have/has established a presence | The local has established a positive relationship with parent and community groups and meets with them on a regular basis | The local officers attend regular school board meetings and routinely speak at “public comment” on issues that affect their members | The local leadership has a good relationship with some of the labor leaders in the community and they stay in touch by phone or when issues arise | The local has done a good job of branding itself/creating a strong message to engage the community to garner support for its members |
| **4.** | The local has a community outreach plan. Its members have established strong relationships with community leaders/groups & participate in community events | The local partners with parent/community groups and holds vital meetings to educate and engage them in vital school issues | The local officers and building reps from most buildings and worksites attend all meetings and have a strong influence on the local BOE members | The local’s members have critical ties to other unions in the area. Relationships are used to further the goals of the local  | The local has conducted many community power studies and has analyzed the data they have gathered on community leaders and members |
| **5.** | The local has a vibrant community outreach program and has very strong ties with key stakeholders that turn-out for local events on a regular basis | The local has a strong relationship with parent/community groups. They are collaborative partners | The local has an ongoing working relationship with local board members, is involved in board races and exerts collective influence on BOE | The local’s member committee attends Labor Council meetings. Labor solidarity is strong and Labor is ready to mobilize at a moment’s notice | The local’s relationships in the community are strong and established. They engage and educate community members on important issues |

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**INDICATOR: LEADING OUR PROFESSIONS**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **RANK** | 1. **IMPROVEMENT & LEARNING**
 | 1. **LEADS ON STUDENT LEARNING ISSUES**
 | 1. **POLICY ADVOCATE FOR PROFESSION**
 | 1. **USES DATA & RESEARCH TO ADVANCE PROFESSION**
 | 1. **REFLECTIVE PRACTICES**
 |
| **1.** | Local does not offer professional development sessions and does not encourage members to participate in professional learning opportunities | Local leaves student learning decisions to district | Local isn’t involved as an advocate for profession | Local isn’t aware of or doesn’t use current research to support profession | Local members are not mindful or deeply aware of who they are as educator leaders, do not engage in reflective instructional practice, and are not aware of areas of possible growth into further leadership.  |
| **2.** | Local offers minimal professional development, isn’t sure of members’ need for learning opportunities because local hasn’t done an assessment | Local is rarely involved when issues arise regarding student learning needs | Local is aware of need for policy change to advance student learning but isn’t sure how to make changes | Local is starting to review research to support the profession | Local members are somewhat mindful and aware of who they are as educators, partially engage in reflective instructional practice, and are aware of areas of possible growth into further leadership.   |
| **3.** | Local supports district’s professional development offerings; has assessed members’ needs and expertise | Local is aware of student learning needs in district. Has advocated for needs.  | Local is seeking partnerships for advancing student learning and the profession | Local is aware and understands research and policy trends that may impact district | Local helps to create conditions that encourage reflection among peers, administrators and other staff members, based on data and best practice.  |
| **4.** | Local assesses members’ professional development needs and partners with district or offers local run relevant professional development | Local leads on student learning needs with district; highlights members credentials/expertise | Local has created alliances with partners to advance the profession and student learning | Local collaborates with diverse stakeholders to share relevant education research to impact district policy | Local encourages a broad and diverse range of stakeholders to reflect deeply on their roles and responsibilities within instruction, policy, the association, or other elements of teaching and leading.   |
| **5.** | Professional development is member lead, member driven. Local partners with NEA, WEAC, WEA Academy and utilizes members for professional development.  | Local works collaboratively on student learning needs in district | Locals puts proactive strategies in place for our professions by anticipating challenges.  | Well-respected local leaders drive effective district policy using research and solicit WEAC/NEA experts when needed | Local helps systems to function with a culture of mindful and meaningful reflection and leads the development and implementation of large-scale instructional, policy, and organizational ideas that incorporate reflection and refinement.  |

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**INDICATOR: COMMUNICATION**

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| --- | --- | --- | --- | --- | --- |
| **RANK** | 1. **MEMBER CONTACT**
 | 1. **INTERNAL COMMUNICATION**
 | 1. **EXTERNAL COMMUNICATION**
 | 1. **MESSAGING AND BRANDING**
 | 1. **PUBLIC RELATIONS**
 |
| **1.** | The local has member contact only during a crisis | The local has minimal communication with the membership and/or the president handles all communication | The local has very little contact with external groups, parents, labor unions | The local has not developed a message or any branding for its members, district or the community | The local does not have a public relations plan in order to build relationships |
| **2.** | The local occasionally communicates with its membership | The local officers or association representatives occasionally distribute fliers in order to inform members of important issues | The local president has contact with a few groups, including the media, but only in times of crisis | The local has developed internal messages during difficult times but has not yet employed any branding in order to bolster its public image | The local’s public relations lies entirely in the hands of the local president |
| **3.** | The local president occasionally makes site and building visits to speak with members on important issues or to listen to concerns | The local has a printed newsletter that goes out to members on a quarterly basis. The newsletter details local, district and state (WEAC) information | The local’s *communications officer* communicates vital information/issues out to external groups during a crisis | The local has formed a member committee to develop a strong internal and external message that resonates with members as well as the community | The local’s officers build positive, long-lasting relationships with district administration, the BOE, its superintendent and community leaders/groups |
| **4.** | Local officers and association representatives hold regularly scheduled meetings with membership in order to keep them informed and engaged | The local has a website, e-mail/text blasts and telephone trees as well as utilizes social media to reach membership  | Local officers/member group/committee meet with external groups on a regular basis to provide them with a deeper understanding of issues | The local’s message and branding is clear and unifies the membership as well as the community around its core values | The local’s officers, leaders and members work together to create a positive and powerful image of their local association |
| **5.** | The local has a strong member contact program that employs relational, member to member conversation techniques or small group meetings | The local has an updated contact data base for all of its members and communicates with them regularly and often utilizing all types of media | The local is the first contact for external groups when educational issues arise. The local has a dedicated website and e-mail communications data-base | The local and its membership have developed a strong, positive and respected reputation in the district and community over time | The local is recognized and heralded in the district, community and local media as a leader in education and its members as “experts” in their profession |

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**INDICATOR: GOVERNANCE/LEADERSHIP DEVELOPMENT**

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| --- | --- | --- | --- | --- | --- |
| **RANK** | 1. **LEADERSHIP TRAINING**
 | 1. **NEW LEADERSHIP**
 | 1. **DIVERSITY IN LEADERSHIP ROLES**
 | 1. **LEADERSHIP TEAMS**
 | 1. **ASSOCIATION REPRESENTATIVES**
 |
| **1.** | The local officers do not provide leadership training for their members, but the officers themselves have attended regional or state trainings | The local holds officer elections governed by their Constitution and By-Laws and members who wish to run for leadership positions run for office | The local does not intentionally encourage or seek out diversity in different leadership positions | The local has only one dedicated leadership team made up of its elected officers | The local has no (or very few) association representatives at the different buildings or worksites in the district |
| **2.** | The local president/officers encourage members to seek leadership training opportunities and partner with WEAC trainers at regional and state conferences | Local president or officers identify possible member leaders for future roles or commitments for local activities | There is some gender and racial diversity in the elected officers as well as in some of the leadership committees and teams | The local encourages and engages members to join committees or groups in the district in order for them to have a stronger voice in their profession | The local has a few association representatives scattered throughout the district that disseminate information (fliers) when asked |
| **3.** | The local provides some local training and workshops for their members by bringing in outside trainers. The local sponsors members for selected conferences | The local officers understand the pressing issue of new leader recruitment and target younger members for local leadership roles | The local leaders intentionally seek out minorities, millennials, unrepresented groups and different job classifications for key leadership roles | The local officers advocate for their members to be placed in key district positions. They also partner with members on various teams | The local has over 50% of their buildings/worksites represented with AR’s who are trained at various stages to perform union duties |
| **4.** | The local president and officers have been trained on delivering workshops on enhancing leadership skills and regularly offer trainings in their local | The local has an active new leader recruitment program that targets members with identified knowledge, skills and potential | Local officers/leaders reach out to the members and underrepresented groups and classifications in order to achieve representational balance  | The local functions and makes critical decisions based on team leader ideas and advice. The local is widely represented throughout the district on numerous committees | The local has a strong AR training program which teaches BR’s how to advocate, represent members and hold relational meetings, at more than 75% of the district’s worksites |
| **5.** | Most of the membership of the local has gone through leadership training and is very active and engaged in their local | Officers in the local systematically engage, recruit, train, develop and mentor new leaders for key leadership roles in the local association | The local officers, leaders and committee members are a diverse but very unified group and share a common vision and mission for the local association | The local hears all of the collective voices of its team members, who have become experts on issues that impact their co-workers | The local has a strong AR program led by senior AR’s who train their own members on how to advocate for their interests at the worksites |

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**INDICATOR: STRATEGY AND FISCAL HEALTH**

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| --- | --- | --- | --- | --- | --- |
| **RANK** | 1. **GOVERNANCE STRUCTURE**
 | 1. **MEMBER-DRIVEN GOALS**
 | 1. **DELEGATION OF LABOR & ROLES**
 | 1. **FINANCES**
 | 1. **BUDGET**
 |
| **1.** | The local has an outdated Constitution and By-Laws and the local officers have been in their roles for many years | The local does not have any clearly defined goals for the association  | The president does all of the work. There is no delegation of labor and there aren’t any committees. Officers follow their president | The local struggles to recruit members, keep accurate records and to remain accountable and transparent. There are no checks and balances | The local president maintains the local’s checking account and no real budget actually exists  |
| **2.** | The local officers abide by the C&B that has been updated at least once in the past five years. They hold officer elections and schedule membership meetings for contract negotiations or during a crisis | The president has some goals and outcomes that are shared out to the rest of the membership on a yearly basis | The president of the local and one or two officers do most of the work of the local with little delegation of duties  | The local has provisions/policies that govern maintaining membership records | The president of the local determines and controls the budget and has had minimal treasurer and budget training |
| **3.** | The local has an updated C&B and local officers attend most meetings, trainings, WEAC Conferences as well as participate in the WEAC and NEA Representative Assemblies | Local officers meet with members from time to time in order to listen to their concerns and ideas | The local officers have clearly defined roles and delegation of duties. A few member committees meet on an ad hoc basis. Work is done by Officers and AR’s | The local treasurer has a clear understanding of the local finances, WEAC policies and procedures, applicable tax laws, dues transmittal process | The elected treasurer of the local handles the checks and balances of the association’s budget but has not had a great amount of training |
| **4.** | Local officers are seen as leaders and role models by the membership and are supported. They advocate for their members and use parliamentary procedures to run meetings.  | The local has a mission and vision (statements) and strong goals that have been developed through countless relational member meetings | Rank and file members are encouraged to take on different roles in the local and the work is performed by many members | The local has a finance and budget committee that provide members with a transparent and strong accountability system and accurate record-keeping | The local’s treasurer is well-trained and keeps a good running account of the budget (record-keeping) and provides regular statements to the officers at meetings |
| **5.** | The local’s governance structure is sound and very representative of its membership. They advocate and represent their members’ interests at the local, state and national levels | The local has active and engaged members that drive the local’s goals and set new yearly priorities  | The local is member-driven and, although the president and officers lead the association, members are actively engaged and involved at all levels | The local undergoes a yearly audit of its finances and the membership votes to approve the budget. Members’ dues dollars are being used wisely | A member budget committee, provides a quarterly budget review/financial report which reflects the goals of the local |

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**WEAC Local Self-Assessment Summary**

 Local’s Name: Date:

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| --- | --- | --- |
| **Program Area** | **Rank** | **Needs** |
| Advocacy: Overall |  |  |
| Advocacy: Political Action |  |  |
| Organizing: Member |  |  |
| Organizing: Community |  |  |
| Leading Our Professions |  |  |
| Communication |  |  |
| Governance/Leadership Development |  |  |
| Strategy & Fiscal Health |  |  |

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**WEAC LOCAL SELF-ASSESSMENT TOOL**

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**SO WHAT’S NEXT?**

After your local’s leadership has met, discussed the findings, and worked on the summary document, it is critical that the team reach consensus on the local’s immediate needs, as well as identifying those which are short-term and long-term. Once the team has determined these needs, they need to **prioritize them**. It is highly recommended that if a local consistently rates on the “*higher end*” of the scale for most of the indicators, that they focus on moving towards building capacity from the building and district level, to that of the community, county and state levels. If a local rates on the lower end of the scale with a lot of room for growth, they should focus on only one or two indicators to work on at a time.

**FOCUS on Questions such as…** What can be achieved right now? What can be done in three months, six months, or a year? What resources are needed? Who will be responsible and accountable for the work? Should the local assess themselves once a year? Twice a year? The assessment should guide the planning process.

**Sharing Information with Your Members**:

Once the assessment and discussion is complete, the local’s leadership should disseminate the results to the membership in an all-member meeting. This is a perfect opportunity to personally engage members and share the local’s priorities. It is also a great way to receive feedback, member-input and provide members with a voice. By doing this, you identify member interests, passions, and gauge commitment and involvement, especially by asking new members or members that have not participated in any of the local’s activities in the past to work together in order to help achieve the local’s goals.

Armed with this roadmap, the local can work on specific strategic and measurable goals that are driven by its membership. Building a strong local takes time and commitment, but it also takes strong leadership. Keep at it! There is strength in unity!