

GET STARTED!

Assessment Systems: Track Progress and Build Support

An assessment system is a numeric “shorthand” that can help track conversations, support, “yes” votes and overall activity. To take advantage of an assessment system everyone has to follow the same rules, or “speak the same language,” and it has to be simple enough to remember and follow.

ADVANTAGES OF AN ASSESSMENT SYSTEM

- Provides a quick snapshot of support, especially for large numbers of people.
- Maintains consistency about the results of one-on-one conversations.
- Provides data that helps analyze strengths and weaknesses.
- Allows for easy input of data in the database.

MAKING IT WORK

- **Define each rating** and keep it simple.
- **In-person one-on-one conversations** are most reliable.
- **Create specific criteria** that everyone can use no matter what their personal style.
- **Train members and organizers** who will use the system to make sure everyone is on the same page.
- **Discuss “borderline” scenarios** and how the group wants to handle those situations.



Beware of Over-Simplification

Be careful of adopting the assessment shorthand: “He’s a 2!” It only has meaning in the context of your mission, what you are trying to accomplish. It obviously doesn’t tell you everything about a person.

IMPLEMENTATION

- **Develop a tracking system** that shows the assessment, the date of the assessment, and any other comments and connections that should be tracked.
- **Debrief the conversations** and assessments from organizers and leaders. This will help gauge whether people are using the same criteria.
- **Be open to hearing the bad news with the good news.** Assessments do not matter if they don't reflect reality.

Create Objective Criteria

- Use the same question and use the answer to determine assessment.
- “Signed the petition” is more objective than “said they thought it was a good idea.”

SAMPLE ASSESSMENT SYSTEMS

Here are a couple approaches to consider for internal organizing or an election campaign. A good assessment system supports the goals of the campaign.

Internal Membership Drive

Rating	Definition	Description
1	Activist	Actively supports the union by organizing and following through on commitments.
2	Union supporter, member	Signs a membership card.
3	Undecided, not a member	Unsure if they want to join. You can identify the type of followup that might move this person to join.
4	Not a member, against the union	Unwilling to join the union. May speak out against joining; not likely to join anytime soon.

Union Election Organizing Campaign

Rating	Definition	Description
1	Committee	Actively supports the union by organizing and following through on commitments.
2	Yes vote	Signs an authorization card or petition; actively and publicly supports the union; states clearly why they will vote yes.
3	Undecided	Persuadable. May or may not have signed a card/petition; is not active or clear about voting yes; states they are undecided; has a reason that may move them to vote yes.
4	No vote	Says they will vote no, or are likely to vote no. Not persuadable.