

Assessments

Assessment: is a word that describes the act of Employee Representatives engaging workers in one-on-one conversations to determine as best as possible their degree of support for the union based on the *directly observable* verbal, visual and behavioral indications uncovered in the conversation. Assessments are conducted several times during the life of an organizing drive and for various strategic purposes. Although the underlying reason for assessments is to measure level of union support at any given point in time, assessments also are used to:

- Track movement of support.
- Guide allocation of time and resources in a campaign.
- Provide a road map of who needs highest priority of personal Employee Representative attention in a campaign.
- Measure committee effectiveness.
- Uncover issues.
- Gain feedback on effectiveness of tactics and issues.
- Assess outcome of worker “tests” throughout the campaign.
- Test effectiveness of employer campaign.

Conducting assessments is a fundamental skill that Employee Representatives must learn and constantly practice. Conducting assessments effectively calls upon an Employee Representative’s skills in communication and observation, especially listening skills.

Assessments Must Be:

- **As precise as possible**
- **Directly observable**
- **Measurable**

Assessment values are rated as follows:

- (1) Employee Reps, Union Officers, Organizing Committee and Volunteers
- (2) Tested supporter – consistently passes campaign tests *including the most recent*
- (3) Supporter who missed or failed the most recent test; or, about whom there are conflicting observations by organizing staff or committee members; or, supporter who raises more questions about the union than about the employer or opposition
- (4) Unit member who will not vote yes or support the union
- (L) Some Employee Representatives find it helpful to designate leaders with the letter **L** beside an individual’s assessment value.

There are no un-decided.

Assessments have a limited shelf life, depending on the amount of time passed since the last test, the intensity and effectiveness of the anti-union campaign, and the quality of the relationship between the staff or volunteer Employee Representative and the worker.

The goal initially is to communicate in person with every member of the unit, and over the course of the campaign to move the 3's and 2's into the 1 column, and to probe the possibilities of identifying 4's that can be moved upward or simply left alone. It is up to the campaign director to establish what specific behaviors or characteristics are to be measured by the 4-point scale based on the objectives of the campaign, then to make certain that the scale and what it stands for are communicated to the campaign participants, including the Regional Director and local leadership.

Like all organizing conversations, organizing conversations for assessment share the same goals:

1. We want to learn about job-related issues/concerns, personal and professional goals and aspirations, about desires to see change happen and the nature of that change.
2. We want to answer questions about the union, deal with fears and anxieties.
3. We want to educate about what a union really is, what it is all about.
4. We want to inoculate against the boss's campaign and anti-union innuendo.
5. We want to challenge workers to act upon their concerns/desire for change and to take actions in support of the union.

In addition, the best organizing conversation are ones in which the Employee Representative does 80 to 70 percent of the listening and only 20 to 30 percent of the talking.

How does an Employee Representative make sure there is adequate listening? By asking good, open-ended, questions. For example:

"I like to hear your opinions on [issue]? What do you think about it?"

"What do you like/dislike about your job?"

"What would you change about working here if you had the chance?"

"What would you want to make different about working here?"

"What do you think you might be able to do support the union?"

DO always base assessments on directly observed verbal, visual and (most important) behavioral indications of the worker's degree of support for the union, such as volunteered statements or more preferably observable actions in support of the union.

DO NOT based assessments on supposition, hearsay, rumor, or a previous assessment.

DO begin assessment conversations with open-ended probing questions that allow you to uncover indications upon which to base your assessment.

DO NOT rely entirely on closed-ended "yes' or "no" questions or direct questions on the worker's degree of union support that will easily allow the worker to provide the answer he or

she thinks you want to hear or need to hear so you will just go away. If you do ask direct questions, make sure you collect other evidence to support or refute the answers you hear.

DO use active listening skills.

DO NOT be so focused on how you will respond to what you hear that you miss important indications provided to you in the conversation that will help you with your assessment or that will provide clues on how to probe more deeply for those indications.

DO watch for non-verbal indications in addition to what is being said in the assessment conversation.

DO NOT ignore facial expression and body language. They are important elements of the conversation.

DO treat the assessment conversation like any other organizing conversation.

DO NOT communicate overtly that the purpose of the conversation is to make an assessment.

DO make mental notes of how you will assess the worker, how you will justify that assessment based on what you observed and any issues, problems uncovered in the conversation.

DO NOT make written notes during the conversation and **DO NOT** complete any paperwork associated with the assessment in front of the worker.

NOTE: It *is* appropriate—and strongly advised—to make notes immediately after the conversation when the Employee Representative is no longer with the worker. Also, it *is* appropriate to make notes on information a worker offers to the organizing campaign, such as names of co-workers, phone numbers, information on the employer, etc.—but first gain permission from the worker to do so.

DO NOT be fooled by the “friendly 4,” the worker who is nice to you but does not provide any evidence of having the characteristics of someone who should be assessed a “1”, “2” or “3.”

DO NOT confuse assessing worker support for the union with assessing personality. There are people who you do not personally admire who are “1s.” Conversely, the nicest person you know may never support the union.

DO end the assessment conversation in as positive manner as possible, keeping the door open for future contact with the worker.