



1. Charting:

It is fundamental to chart membership. Without charting you have no ability to assess your base and analyze your strengths and weaknesses. Charting is a map. It is a layout of your terrain.

a. Develop a charting method.

Charting varies from facility to facility. Determine the method of charting and you will have identified your method of organizing. Ex. Units, Shifts, Seniority, etc.

b. Get clean lists.

Do not rely on or trust the employer to give you accurate information. NYSNA will request lists but do not trust them. They are old, outdated, and generally inaccurate. Develop a method to get the correct names and contact information of members and use the other lists to cross reference. Charting is also a great organizational activity for members. Ex. Schedules, phone trees, asking and writing down, etc.

c. Set a timetable for charting.

Make realistic goals. This is an easy test and it will give you a chance to assess the strength of your membership.

2. Assessing:

Now that you have identified what your base is with charting, what you're going to say and the principles you're working under, and what your goals and priorities are, it's time to set values to everything you're doing. It's great to have all of these tools, but they are meaningless if there is no value placed to it.

Assessing is a method of focusing your resources and energies in places of greatest success. If you don't have a grading system, then time and energy may be spent in a place that has less payoff.

A general 1-5 coding system will do with 1 indicating highest union activity and leadership. Generally focus on the middle (3)—units and members that haven't been involved in union

activity yet, as that is where your time can yield the biggest outcomes when it comes to building member engagement and therefore union power.

Charting

Objective:

1. Determine parameters and basis of charting
2. Chart effectively and efficiently

Background:

- ☐ Charting is a standard method used by all types of organizations and a method of mobilizing to identify, track, and assess one's base.
- ☐ Charting is a scientific method to analyze power, potential targets, and growth areas.
- ☐ Charting must constantly be updated and edited.
- ☐ Charts are only as good as the information given to fill them in.

Lists:

Before you can start charting, you need to determine what lists will be used to chart. Determining the list that will be used also defines how you are going to chart (facility, unit, job title, etc.).

Before you can chart you must establish what you are trying to chart. Once the charting target is decided, the means to acquiring an accurate list to chart the information is needed.

To get this information ask yourself the following questions:

- ☐ What names do I want?
- ☐ Where are the majority of names I want located?
- ☐ What lists am I entitled to that I can use to start with?
- ☐ How else can I get the names I need?
- ☐ How long will it take me to get the lists I need?

- ☐ How can obtaining a list be used as a building exercise and a way to involve more members?

Charting:

Charts vary from facility to facility, and organizer to organizer. No two charts are ever the same. When you begin charting keep these tips in mind:

- ☐ You must be able to look at your charts and understand them instantly.
- ☐ You must be able to explain your charting system in under 2 minutes.
- ☐ No two charts look the same. Make sure your chart meets your organizing needs. However, those working on the same campaign need to work off of the same charts.
- ☐ Always have back-ups to your charts.
- ☐ Ensure your data is also updated in NYSNA's electronic database (Salesforce), which is what will be used for sending emails and texting, etc.

Assessing

Objective:

1. Rank your strengths and weaknesses.
2. Place value on all aspects of the campaign.
3. Prioritize duties and tasks.

Background:

- ☐ Assessing is used in almost all aspects of our life without our knowledge – pro sports teams, electoral politics, credit scores, etc.
- ☐ Traditional assessments allows NYSNA to organize members during and after a campaign.
- ☐ Assessing is fluid and changes with the campaign but must always be done to keep an honest view of progress or the lack thereof.

Define Priorities:

- ☐ Assessing cannot and should not be used on everything.

☐ Determine what needs to be assessed and that is where you will spend resources and time.

☐ Your charts and campaign priorities should always be reassessed and updated.