THE ROAD TO STUDENT SUCCESS

A TOOLKIT FOR STUDENT-CENTERED ADVOCACY

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The Road to Student Success:
A Toolkit for Student-Centered Advocacy

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NATIONAL EDUCATION ASSOCIATION

The National Education Association is the nation's largest professional employee organization, representing 3 million elementary and secondary teachers, higher education faculty, education support professionals, school administrators, retired educators, and students preparing to become teachers.

THE ROAD TO STUDENT SUCCESS

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Tears, joy, and support mark return of Reynoldsburg teachers to classrooms

More than anything, Reynoldsburg teachers, students, parents, and community residents wanted normalcy, the kind that comes with being in a classroom led by teachers whose passion it is to help students succeed.

That day came Monday, nearly three weeks after 364 teachers in the central Ohio community voted overwhelmingly to strike over class sizes (in some cases that had ballooned to 40), and a merit pay proposal that would have evaluated teachers on the basis of standardized tests, which had already prompted an exodus of teachers.

Throughout the long and stress-filled days of the strike, teachers and parents were of one accord: The Reynoldsburg School Board and superintendent were seeking to impose a radical agenda that was not in the best interest of students or teachers.

Among the gains won by the teachers:

- For the first time, there is language addressing class size: goals of 25 for grades K-4, 32 for 5-8, and 35 for grades 9-12

- A framework to address larger class sizes once those goals are met

- Time for teacher planning

- A two percent pay increase the first year, and slightly less than that the following two years

- A merit pay proposal decided by someone other than the superintendent.

"The push for smaller class sizes has been the major point of concern for teachers, students, and parents, and this agreement is a step in the right direction," said Reynoldsburg Education Association (REA) spokesperson Kathy Evans. "We're pleased that we were able to make progress here, but we will continue to work for smaller class sizes, particularly in the upper grades."

For their part, parents are grateful to teachers for standing up for students and are thankful school is back in session. "We Support Reynoldsburg Teachers" yard signs remain standing throughout the community and in businesses.

But parents are not likely to soon forget the heavy-handed tactics that the superintendent and conservative school board members used against teachers and parents. The Families for Teachers Facebook page is abuzz with discussions and plans on how best to harness their energy, organize, and voice their displeasure at the ballot box when two board members are up for re-election in 2015.

Evans noted, "Our parents are incredible. They are just as determined as when the strike began. They're looking to organize and make lasting change."

How did they do it? REA's commitment to student-centered advocacy

► REA's leaders were committed to leading the way.

► REA was committed to starting the process well before bargaining began.

► REA members were asked to sign a student-centered platform and commit to standing behind the bargaining team.

The community was committed to supporting caps on class size and addressing runaway teacher turnover.

A MESSAGE FROM THE PRESIDENT

I know how much you and the millions of talented NEA members care about the success of students. Every day, your passion drives change that makes public schools even better and more inspiring places of learning.

And something remarkable is happening.

More and more, NEA local affiliates are organizing around issues that extend beyond wages, hours, and professional working conditions.

Across the country, affiliates are also bargaining and advocating for their students. From class size to adequate resources to family involvement, affiliates are demanding changes of policy and practice that improve schools.

Affiliates are using collective bargaining, labor-management collaboration, school-community partnerships, and a host of innovative practices to fashion new

agreements, to develop new understandings, and to drive new school board policies to help students to succeed by improving the conditions under which students learn and educators work.

This is a sea change. This is about leveraging our collective power in new ways to raise the voices and vision of educators, the people who really know how to make schools better. It's about taking charge and implementing educator-led solutions that work for students. It's about using approaches tailored to each community to assure fairness and opportunity for every student.

NEA is proud to present this toolkit to help you learn more about these techniques—and to inspire you with the new, creative ways that affiliates are fighting for students. This toolkit includes information that both supports educators and helps students succeed.

NEA is supporting this movement by sharing innovations among affiliates nationwide as together we tackle critical issues in our schools.

This is what the great public schools movement is all about: teachers and education support professionals leading the changes that give all students the schools they deserve.

Thank you for your remarkable contributions.

Lily Eskelsen García
NEA President

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HOW TO USE
THIS TOOLKIT

The Road to Student Success Toolkit is divided into three sections:

ACTION GUIDE

ACTION GUIDE—This Guide provides suggested action steps you can take to identify priority needs in your school and to identify and involve partners in the effort. These suggestions have come from NEA affiliates that have used these techniques. You can tailor these to your community.

REAL PLACES/REAL STORIES

REAL PLACES/REAL STORIES—To help learn what other affiliates have done, we feature a selection of examples of student-centered advocacy in practice, illustrating the diversity of approaches used to tackle a variety of issues. These are organized by the issues that affiliates addressed.

RESOURCES

RESOURCES—This section provides you with support and resources as you move forward with action to advocate for students.

As you go forward engaging in student-centered advocacy work, NEA can provide support in various ways such as:

- *Direct call/conversation with CBMA experts in NEA/Washington, DC*

- *E-mail consultation with CBMA experts*

- *Work with Regional Director to find sources of information*

- *Signing up for regular webinars and e-newsletters*

- *Talk to others involved in this work on the NEA Professional Practices Communities. Contact Dr. Barbara Hopkins, for online reference/access, bhopkins@nea.org, 202-822-7378.*

ACTION GUIDE

This guide presents a framework of major steps that you can take to advocate for the schools that students deserve. This is not a detailed review of every possible action, but rather it is an overview of a process you can use to inspire members, organize, and gain community support for a student-centered agenda. The framework is based on certain assumptions:

- Student-centered advocacy **adds to**, rather than replaces, traditional bread-and-butter advocacy.

- **Collaboration** with other groups is a non-negotiable in pushing for meaningful change.

- It will be **an affiliate priority** to plan and sustain this work.

- **Relationships with partners** in your community are valuable, as is the time it takes to build those relationships.

- Student-centered advocacy can yield satisfying results, but **the work takes time**.

- Student-centered advocacy also **benefits educators**.

To organize your efforts, this framework follows a strategic planning cycle using a four-stage approach: **assess, plan, act, and evaluate**.

ASSESS

PLAN

Framework

ACT

EVALUATE
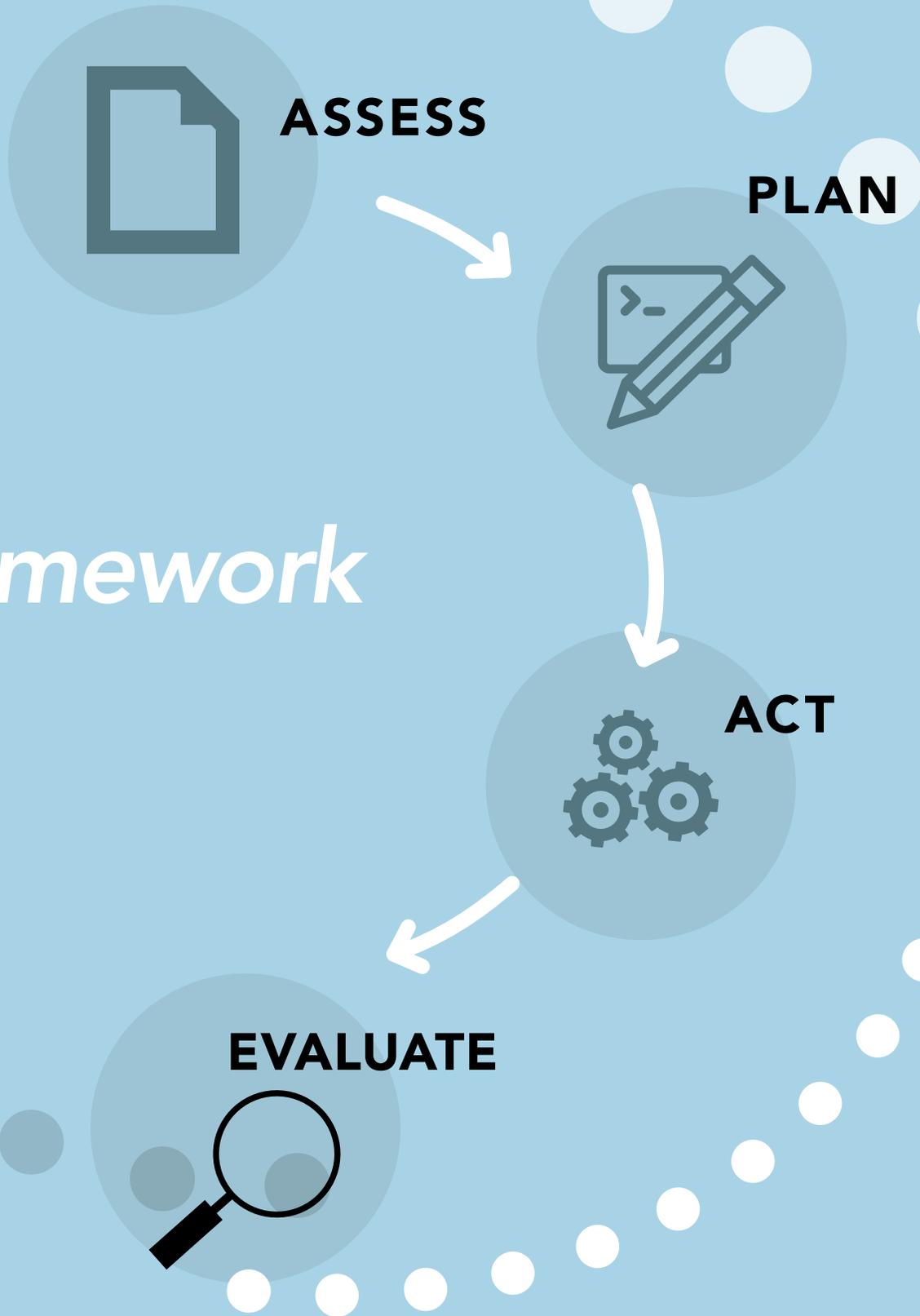
ASSESS!

Internal and External Assessment!

Assess your internal member engagement capacity. Start by learning more about your members—who they are, what they care about, and how they connect with the community. These are the members who can then be mobilized to bring in other members and the community as partners.

Parents and families are our most valuable and essential allies in this effort. We must find new ways to strengthen this alliance as well as draw in new parents. We want them to know that we value their role as their child's first teacher and we need their ideas and their support. But everyone who lives in your community has a stake in our students' success. These children will one day determine the health of our economy and our democracy. That is why advocating for our students must be shared widely, by family members, teachers, universities, business owners, elected officials, faith communities, seniors, new parents, and opinion leaders.

By broadening the circle of this partnership, we better serve our students, and we better meet the community's needs. Communities that embrace this broader approach to student success will see the power of collaboration.

SUMMARY OF ASSESSMENT

1. Assemble your affiliate team
2. Identify the problems and challenges to address
3. Assess capacity
4. Define possible solutions
5. Understand member and public attitudes
6. Conduct a SWOT analysis
7. Conduct a GPS Indicators Framework audit
8. Identify community "Action Partners"

1. ASSEMBLE YOUR AFFILIATE TEAM

   ▶ <u>Assemble an affiliate team.</u> This team can grow over time as the campaign evolves. Aim to establish an initial group with the authority to engage others in the advocacy effort.

   ▶ <u>Keep governance involved and informed</u>. Governance leaders will bring invaluable insight and contacts. Recruit them as essential activists in this work. Early on, discuss the problem(s) you are tackling, get their input, ask them to champion your work, and discuss the roles they can play in advancing the solution. Throughout the process, continue to keep them and your staff informed and engaged to help further ensure and solidify success.

The Federal Way Education Association (Washington) established a building association team (BAT) structure of one rep for every ten members. BAT reps are responsible for personally connecting with teachers in the schools. On one issue about the district calendar, the BAT activated and got 86% of surveys filled out in three days.

This shared leadership structure gives more people an active role in the Association. It also increases the confidence that the Association is indeed speaking for all members. During bargaining, BAT is used for info-sharing and feedback.

▶ Identify a "Lead" to help manage the process. With input from the affiliate team, this person will:

- Convene meetings
- Set agendas
- Arrange to keep minutes
- Follow-up with individuals on assigned tasks
- Share information with the group

▶ Establish roles. Determine what role each team member will have. Roles might include such activities as member and public communication, partnership development, and research. Different people can help with various tasks over time.

2. IDENTIFY THE PROBLEMS AND CHALLENGES TO ADDRESS

▶ Draft a list of top challenges. Ask members of your affiliate team to develop a common understanding of the problems that are interfering with teaching and learning. Look at disruptive professional issues. For instance, is turnover high or professional development poorly designed? Are there:

- Too few resources available for students?
- Environmental issues in the school itself, such as a building that is in disrepair?
- Classrooms with too many students?
- Health and nutrition services that are lacking or deficient?
- Before and aftercare services for students?

- Lackluster existing relationships built with parents and the community?

▶ Get member input. Use the list of concerns as the basis for canvassing and discussion groups with members to learn more about the specific issues that are problems for the students and educators in your school(s). Survey and meet with members one-on-one to find out what they perceive as the most pressing problems that directly interfere with their abilities to help students learn.

▶ Get parent and community input. Involving the community and parents from the very beginning has proven to be a key component in the success of many student-centered advocacy initiatives. Survey and meet with the PTA, PTO, and community organizations to get their views of problems affecting student learning and the school. Talk with students about what they perceive as problematic for themselves and their peers. Also consider contacting the NEA Priority Schools Campaign Department for their work regarding Family School Community Partnerships (https://insidenea. nea.org/Departments/PS/Pages/ Default.aspx).

▶ Assemble the results of these discussions. Use this information to design a survey that will go out to the membership and school community.

3. ASSESS CAPACITY

▶ <u>Analyze your Association structure to determine how best to engage members and the community</u>. For example, ask your Association Representatives to assess how many members the Association can reach in person. Confirm the accuracy of the contact information in your membership database. What avenues can the Association pursue to reach those members, for example, e-mail, phone calls, and snail mail?

▶ <u>Work with governance</u>. Ask leadership how they can support contacting members and/or those in the school community to advance the campaign.

▶ <u>Inform and involve Association staff</u>. Engage staff early so they can provide ideas and support every step of the way.

▶ <u>Review the relationship with the school system management</u>. Determine how best to seek administrators' support for student-centered issues. You might decide to work with management early in the process or choose to wait until you have assembled more information and a stronger coalition. You can revisit your strategy regularly as the campaign progresses, and decide whether it is reasonable to change tactics as far as how to engage management.

4. DEFINE POSSIBLE SOLUTIONS

▶ <u>Don't try to solve every problem</u>. A certain recipe for failure is taking on too much responsibility.

▶ <u>Based on feedback, prioritize</u>. Initially, you will probably identify more problems than you can take on at one time. Your team can prioritize which issues they perceive are more important. For example, if members, families, and others all believe large class sizes are a problem for student learning, you might set that as a priority issue.

▶ <u>Once priorities are identified, consider which solution(s) you might wish to advocate</u>. Some of their solutions might suit your needs or you might develop your own solutions that fit your unique school.

▶ <u>Don't get stuck!</u> If you want to learn about other affiliates' solutions, you can call or e-mail NEA and consult with one of our collective bargaining experts. The staff will be pleased to talk with you.

5. UNDERSTAND MEMBER AND PUBLIC ATTITUDES

It is invaluable to collect data on the views of key stakeholders about the priorities and possible solutions you hope to address. Not only Association members, but school families, civic leaders, and members of the broader community are essential players in advocating for better schools.

There are different techniques to develop a strong understanding of member and public attitudes. These include:

▶ Surveys

▶ Small group discussions, such as at PTAs and civic associations

▶ Community forums

The Saint Paul Federation of Teachers hosted a series of facilitated book discussions. These "book clubs" were divided into two groups comprising teachers, ESPs, parents, and community representatives. One group read *Teaching 2030: What We Must Do for Our Students and Our Public Schools. The other read The Schools Children Deserve.* Participants were asked to discuss the books and answer three questions:

• What are the schools Saint Paul children deserve?

• Who are the teachers Saint Paul Children Deserve?

• What is the profession those teachers deserve?

A note on surveys

A survey can reveal the intensity of concerns about the problem(s) and the level of support for your possible solution. In addition, survey results might show whether there are certain groups of people, perhaps parents, who are especially supportive of particular solutions to problems.

You can use this data to refine your thinking about solutions and to focus your planning, including outreach strategies, to key stakeholders. The outreach will help build a volunteer base of allied advocates who will support needed changes.

Other affiliates often have found that the public and school families want the same things as members.

You can find examples of those stories in the section titled REAL PLACES/REAL STORIES.

Depending on the survey design, results might help shape the way you talk about your solutions and define your message.

> NEA has survey options you can view in the Resources section.

6. CONDUCT A "SWOT" ANALYSIS

A SWOT analysis is a review of the Strengths, Weaknesses, Opportunities, and Threats (SWOT) facing your affiliate and school community. The analysis informs your strategic plan.

A SWOT analysis helps you develop an effective strategy to advance your agenda by taking a hard look at the external environment, along with your Association's strengths and weaknesses. The analysis will prompt questions: How can you develop a plan that works on your strengths? How should you mitigate against weaknesses?

The SWOT also helps clarify the threats that your affiliate and the new agenda could face. The analysis identifies opportunities in your school and wider community that you might not have considered before but that strengthen an advocacy effort.

> NEA offers SWOT analysis tools you can view in the Resources section

Here is an example of a completed SWOT grid,

SWOT grid example

	Strengths	Weaknesses
INTERNAL	▶ Popular, stable local leadership team ▶ 95% membership rate	▶ Low member involvement ▶ Outdated website ▶ Newest members do not understand the role of the union and are not engaged in union activities ▶ Union has no external partners ▶ The presidents of the teacher and ESP locals are not on speaking terms
	Opportunities	**Threats**
EXTERNAL	▶ Newest members are online and connected to one another ▶ PTA is upset about large class sizes ▶ Annual charity basketball game sponsored by the union has been successful ▶ Community has a history of supporting local school levies	▶ Many experienced members are nearing retirement ▶ Number of empty nesters in the community are on the rise ▶ School board increasingly antagonistic to union ▶ Funding is constrained

7. CONDUCT A GPS INDICATORS FRAMEWORK AUDIT

The Great Public Schools Indicators Framework is designed to evaluate how well states, districts, and schools perform in areas critical to student success. The framework uses seven criteria that represent general areas deemed critical to the success of public schools and students. The seven criteria are: School Readiness; Standards and Curriculum; Conditions of Teaching and Learning; Workforce Quality; Accountability and Assessments; Family and Community Engagement; and School Funding.

The audit is using the GPS Indicators Framework criteria as a checklist to ensure that the things that make a school great are being implemented. For more on this framework, contact NEA's Education Policy and Practice department (https://insidenea.nea.org/Departments/EPP/Pages/Default.aspx).

8. IDENTIFY COMMUNITY "ACTION PARTNERS"

Frequently, others in the school community are deeply concerned by the same things that trouble members. These individuals might not have the same perspective as the educators in the school, but they experience the impact of school problems and are an important part of finding solutions.

These other audiences could become allies—"Action Partners"—who have the skills and interest to work with you to help improve schools.

Community power analysis: Identify which are the key centers of power in your community. Think about the organizations in your local community and assess who are the major influencers, those individuals or groups that bring credibility and a broad base of potential support.

Community forums and surveys can also help inform your thinking about who Action Partners can be. NEA affiliates have found that a variety of supporters are possible, such as other educators, parents and families, administrators, school board members, local civic associations, and chapters of civil rights organizations.

Create a list of those potential partners along with contact information. Include who on your Action Team has relationships with these partners.

The reality is that educators can't do this work alone. We must involve our members and engage the ideas and energy of parents and community members to improve public schools and meet the needs of our professions.

You have finished your assessment!
Now move to creating your action plan.

PLAN!

The Reynoldsburg (Ohio) Education Association relied on a series of member surveys to develop its bargaining platform (i.e., goals). In order for an issue to be included in the platform, it had to be identified as important by a super majority of survey respondents. Once bargaining started, the goals were boiled down to two sentences:

- REA is fighting for the schools Reynoldsburg students deserve.
- This means caps on class sizes and addressing runaway teacher turnover.

SUMMARY OF PLAN

1. Set specific, measurable, and achievable goals
2. Launch your local Action Team; Target your audiences
3. Identify the strategic path
4. Establish functional supports

1. SET SPECIFIC, MEASURABLE, AND ACHIEVABLE GOALS

The results of your assessment will enable you to refine your solutions and set specific goals. Consider the aspirations of your audiences:

- ▶ What are member priorities?
- ▶ What do students need to get a quality education?
- ▶ What does the school community want?

Based on your outreach and surveys, which proposed solutions most resonated with the various audiences? You are likely to find that the interests among these groups are not that different.

Identify a handful of top goals for your student-centered advocacy plan. Setting specific goals will help to drive the plan implementation and allow you to measure progress and the impact of your plan.

Map goals against the potential positive impacts for students, educators, and members of the broader community. Through this process, identify additional community Action Partners who could work with you toward the goals.

The following table offers a sampling of goals and issues that affiliates have identified and aligned with the interests of all stakeholders to help target potential community Action Partners.

Examples of Student-Centered Goals, Their Positive Impacts, and Potential Partners		
GOALS THAT ENABLE WHAT STUDENTS NEED TO SUCCEED	POSITIVE IMPACT ON STUDENTS, EDUCATORS, AND THE COMMUNITY	POTENTIAL COMMUNITY ACTION PARTNERS
Create safe, nurturing learning environments	• Allows students to focus on learning. • Provides students with tools to resolve disputes with their peers, better equipping them to live in diverse communities and work in diverse workplaces. • Allows educators to better focus on instruction and support. • Provides parents peace of mind. • Decreases the disputes that spill into the community. • Provides businesses with employees that are equipped to work and collaborate in a diverse workplace.	Parent organizations; minority organizations; community partners; school boards and school administrators; local law enforcement; dispute resolution professionals; local businesses; other unions
Promote educator quality and professional development	• Provides students enhanced instructional quality. • Provides educators support and opportunity for professional growth. • Provides teacher preparation institutions the opportunity to offer ongoing professional development courses. • Increases the attractiveness and desirability of the community.	NEA; state associations; area colleges and universities; local business and real estate professionals
Develop a respect and appreciation for all cultural backgrounds and languages	• Provides English language learners and students of different backgrounds and cultures the same learning opportunities as students in the majority. • Provides students in the majority the opportunity to learn from those from different cultures. • Allows educators to reach all students irrespective of culture, background, or native language. • Makes schools and communities more inclusive by reducing prejudice and increasing knowledge and understanding. • Increases the attractiveness and desirability of the community.	Parent organizations; school boards and school administrators; other unions; community organizations that represent the interests of immigrants and minorities; local business and real estate professionals
Establish and provide resources to support differentiated instructional practices	• Helps students to learn at the appropriate pace, level, and manner of instruction. • With proper support and resources, allows planning, collaborating, and meeting with parents. • Allows parents to be engaged and have a greater voice in the education of their children. • Promotes a spirit of volunteerism in the community.	Parent organizations; school boards and school administrators; local social service organizations; senior groups
Offer access to health, wellness, nutrition, and counseling services	• Enhances student achievement by increasing health, reducing absences, treating conditions that inhibit learning, and fostering self-esteem. • Allows educators to better focus on instruction and support. • Reduces time lost from work to care for sick children.	Local health departments; NEA's Health Information Network department; community health service providers, including pediatricians, nurses, and dental, vision, and hearing specialists; NEA's Education Support Professional Quality department; social workers and mental health professionals; organizations that advocate for the LGBTQ community
Empower educators and increase collaboration	• Ensure students have educators who are both teachers and advocates. • Give educators the freedom to advocate for students without fear of retribution or retaliation. • Give the community the assurance that its voice is heard and that the leaders and staff of their schools are working together to provide quality educational services and a good return on their financial investment in their schools.	School boards and school administrators; parent organizations; community and business groups

There are many excellent state affiliate communications offices. In addition, the NEA Center for Communications (CFC) can provide sample press releases, effective letters to the editor, social media tools, a message guide book, and sample media advisory (See the Resources section for some of the resources or contact CFC at 202-822-7200 or visit the CFC site): https://insidenea.nea.org/Departments/CFC/Pages/messagecenter.aspx)

2. LAUNCH YOUR LOCAL ACTION TEAM: TARGET YOUR AUDIENCES

You already have created an affiliate team to work on this effort, now you can create a local Action Team (AT). The AT will focus on organizing members and previously identified community Action Partners who are predisposed to advocate for your new student centered agenda.

3. IDENTIFY THE STRATEGIC PATH

Your plan will be driven by the strategic path that your team decides will be most effective in reaching your goals.

For example, you might need:

▶ a legislative solution, requiring state actions;

▶ policy changes, requiring an administrative and/or school board action;

▶ a memorandum of understanding with the school administration;

▶ changes that could be bargained; or

▶ a combination of these strategies.

Consider how best to attain the changes your schools need.

4. ESTABLISH FUNCTIONAL SUPPORTS

NEA affiliates have found a number of supports to be essential:

▶ Communications and public relations

▶ Member engagement

▶ Partner engagement

▶ Research

▶ Plan management

▶ Report and progress evaluation

We briefly review each functional support here with more information available in the Resource Section of this toolkit or the NEA Collective Bargaining and Member Advocacy (CBMA) department. Capturing these strategies in a clearly written plan, including timelines and responsibilities, will help you and the entire team to be organized and keep the work on track.

▶ Communications and public relations

• **Message.** Developing messages and talking points that resonate with your audiences is vital to your campaign's success. The messages should be clear so that your members and the public understand them. Frame issues so that it is clear how your proposed solutions benefit students as well as appeal to other stakeholders such as members, parents, taxpayers, faith-based organizations, and local businesses.

Here is an example of a Message Framework

1 All students, regardless of their zip code, deserve the support, tools, and time to learn.

2 Good education inspires students' natural curiosity, imagination, and desire to learn.

3 Ensure every student has a caring, qualified, and committed teacher.

As a _____ , I am deeply committed to the success of every student. Students are at the center of everything we do.
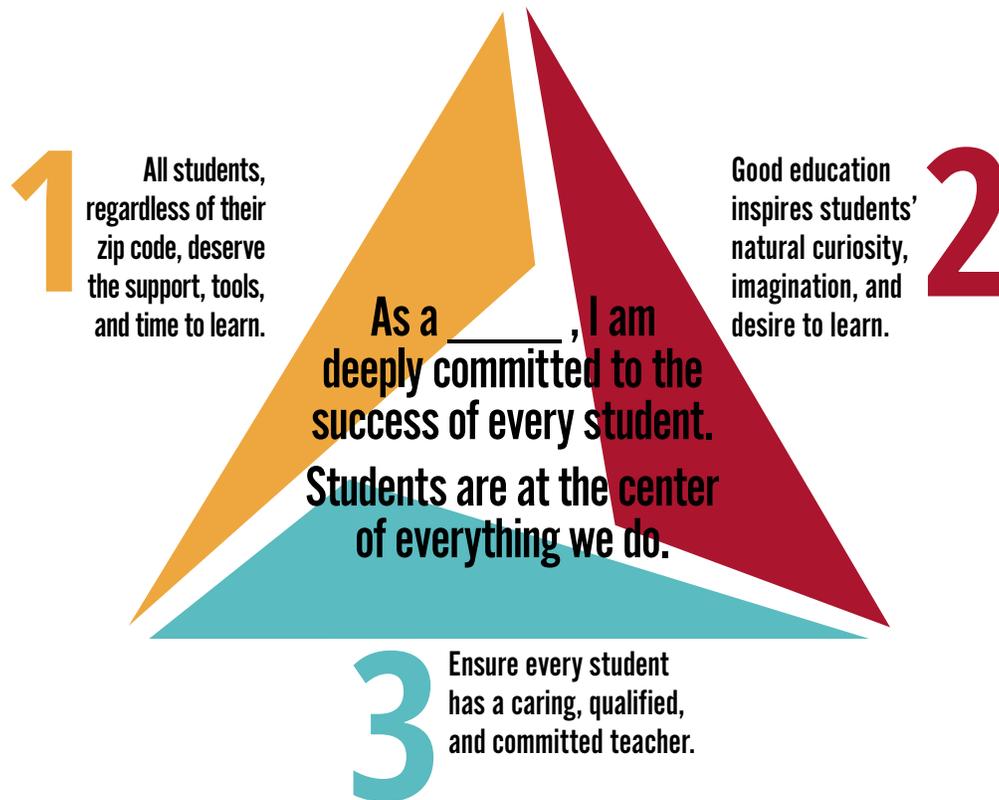
- **Materials.** The Action Team, along with affiliate leaders and staff, will need access to high-quality materials such as talking points, fact sheets, and sample e-mails. Ensure that adequate writing and technical support is available for the timely preparation of these materials.

- **Digital media.** Effective communications require digital engagement such as a compelling website, blogs, Twitter feeds, an active Facebook site, and other techniques. This requires frequent (usually daily) updates and online engagement. Assign adequate support for this demand.

- **Media relations.** Be prepared for media interest in your advocacy. Provide speaker training to spokespersons, including individuals in partner organizations.

- **PR & events.** As your advocacy moves forward, you could design public relations strategies such as public meetings and special events. These are opportunities to highlight partner support and to use volunteers from partner organizations.

Saint Paul Federation of Teachers (SPFT) in Minnesota engaged parents early in their contract campaign to win benefits for students and educators. Parents and members were involved in discussions about the future of the education profession from the beginning of the effort. The SPFT "Power of Community: Organizing for the Schools St. Paul Children Deserve" is in the Resources section.

▶ Member engagement

NEA members are compelling ambassadors who can advocate for student-centered change. Plan to frequently communicate with members to advise them about the effort and to actively engage them in it. After all, the ideas came from them!

Provide local affiliate staff (UniServ Staff) with the talking points and background they need to explain the agenda. Utilize regular member communications channels such as meetings, newsletters, and e-mail to highlight your agenda and feature member support. Identify opportunities to attract non-members to this work. Their interest might eventually translate into new members!

Aim to act on those actions that members are willing and able to do. They might be willing to invite their colleagues and neighbors to join in the campaign; write to their elected officials or local newspaper, especially if you provide them with the talking points or sample language they need; or post a yard sign in front of their homes if you supply it.

Most important, prepare for the first-rate ideas that members will offer about how to spread support for your student-centered agenda. Their active engagement will drive the work.

▶ Partner engagement

You will attain greater success if you engage the broadest possible spectrum of partners to actively work with your affiliate to support the student-centered agenda.

Once you have hosted community forums and administered surveys to identify which are the key centers of power in your community, engage those individuals or groups and make them a part of your Action Team. The Action Team could include representatives from:

- Parent organizations (including those that represent subsets of students such as special needs, gifted and talented, and English Language Learners)
- Neighborhood associations
- Local businesses
- Elected leaders
- Law enforcement groups
- Faith-based organizations
- Health care providers, including those that provide mental health services
- Local chapters of civil rights organizations
- Immigrant and minority groups

Define the roles of the Action Team members. Some members might be asked to support or coordinate activities while others may be asked to communicate to their constituencies what the Action Team aims to do. Whether playing an active or passive role, communications with all members of the Action Team must be constant and messaging must be consistent.

▶ Research

Action Team members should also assume responsibility for researching and collecting data that can be used to support the goals and inform the strategic path. Public records from the district, information from other districts, key statistical data, and information gleaned from additional surveys can be helpful in framing the issue and influencing the message. However, caution must be exercised to avoid *death by numbers*; numbers can be used to support the narrative, but they must not become the narrative.

▶ Plan management

The time, money, and expertise you devote to executing your plan will require careful management.

Early on you took a step to establish a "lead" to ensure good coordination and communication. There also is a need to establish a mechanism to manage plan-related expenditures.

To start, establish a working budget for the plan. It is "working" because there could be developments later on that will require different tactics and therefore a budget adjustment. By establishing an initial control point at the outset, such as a budget and budget manager, your plan will be less likely to experience cost overruns.

In addition, staff time will need to be managed. Your agenda is vital to your association, yet there will be other unrelated work that the association must conduct. Plan management can include blocking out the amount of time that staff will devote to this work as well as being clear on what work staff might need to delay in order to work on the student-centered agenda.

▶ Report and progress evaluation

Progress measures can help Action Team members know how the overall effort is doing and whether adjustments in strategy are needed (See pages 25-27 of the Wisconsin Education Association Council's "Organizing for Action in Your Local Association" in the Resources section for sample progress charts).

When the Clearview (New Jersey) board of education and superintendent announced a plan to privatize custodial services and fire 14 custodians, the Clearview Education Association (CEA) immediately went into action to stop this injustice from happening. CEA used its annual charity volleyball game, an event funded with an NJEA community outreach "PRIDE" grant, to distribute an informational brochure and collect contact information. CEA used this information, and previously compiled contact information, to reach out to and organize the community to support the effort to save 14 jobs. The outpouring of support was demonstrated at a school board meeting where an over-capacity crowd carried signs, participated in a silent protest, and spoke out against the plan to bring strangers into their children's schools.

ACT!
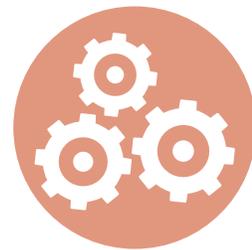
Tired of planning yet? We know that the work to get this far can be tough.

Now, it is time to ACT.

We know that advocating a student-centered agenda may be challenging, but we build on a remarkable tradition. Our American story has been shaped by groups of people—sometimes unlikely allies—who come together in common cause to address inequities and advance a better life. Whether this occurs on a national stage or in a small neighborhood, coming together is powerful.

NEA is a valuable catalyst for positive change because of our affiliate structure, organization, and especially our members.

As you implement your plan, we offer these thoughts:

▶ Take inspiration from NEA affiliates to see what is possible

▶ Make the most out of your power to bargain collectively

MAKE THE MOST OF COLLECTIVE BARGAINING POWER

▶ Leveraging collective bargaining to drive a student-centered agenda

Good examples of locals that have engaged in this collaborative work include the Helena (Montana) Education Association, Montgomery County (Maryland) Education Association, Seattle (Washington) Education Association, and Spokane (Washington) Education Association. The language from these commitments to collaborative work can be found in the Resources section.

Across the country, NEA affiliates are using collective bargaining and other collaborative processes to advance improvements affecting students. Here are just some examples from actual NEA affiliate model contracts, collectively bargained local contracts, and school board policies that

made changes to support student success. These language examples are located in the Resources section of the Toolkit.

Classroom related

- Professional development
- Mentoring
- Collaboration time
- Class size
- Safe environment

Outside the classroom

- Support services and programs
- Home visits
- Family/school/community liaison
- Before- and afterschool services
- Nutrition
- Health
- Student counselors

▶ Put agreements in writing

Once all parties agree on the student-centered strategy and the terms and conditions of their new relationship, it's important to put those agreements in writing so that everyone is clear about the focus, plan, and roles and responsibilities.

Examples of methods used for achieving these Agreements are included in the Resources section under the "Interest Based Strategies" documents

from the Illinois Education Association and NEA Factsheet on "Collective Bargaining: What it is and How it Works."

▶ Make bargaining and advocacy transparent: Talk to your members and the community

Share information with your membership after each bargaining session—avoid any ground rules that would prohibit communicating with them. Members should have information throughout bargaining. This builds trust and support and increases members' willingness to engage in collective action. Consider different bargaining approaches that engage your members and the community. Interest-based bargaining is one approach.

You can also involve the community throughout bargaining or your advocacy campaign. Including the community early on gives you more opportunities to build relationships with parents, community members and the public. For example, your community partners can serve as your bargaining support network. The Helena Education Association had community members serve on their bargaining subcommittee. The Saint Paul Federation of Teachers fully embraced the Minnesota law that makes public sector contract negotiations public meetings and *invited the community into the bargaining sessions*. Having the community present during bargaining flustered the school board so much that they declared an impasse in order to force negotiations into mediation, a process that is exempt from the open meetings law.

EVALUATE!

EVALUATE YOUR PLAN

Once you have implemented your plan, measure the results. That is the best way to gauge the success of your strategy and methods. Honest evaluations will also tell you whether the plan components should be used in future campaigns.

REAL PLACES/ REAL STORIES

From NEA Affiliates: State and Local Associations Lead the Way

Here are their stories…

Safe, nurturing learning environments

Student behavior and discipline
Bargaining agreements in Minneapolis Public Schools contain language committing support staff, teachers, and administrators to work with the community. Parents and students created a culture of non-violence in the schools and city and established sound interventions (including restorative justice) to address student behavior issues.

Privatization
When a New Jersey school board announced its plan to privatize custodial services and lay off its custodians, the teachers and education support professionals of the 300-member Clearview Education Association (CEA) rallied to save the jobs of 14 workers. CEA, along with parents, students, and other members of the local community, showed up in droves at a school board meeting to protest the proposed subcontracting. Seated in the front of the auditorium—the meeting was moved from the library to accommodate the overflow crowd—were the workers whose livelihoods were being threatened.

Each of the affected members held personalized signs, made by the district's art teachers, which included how many years of service the member had with the district. Sprinkled throughout the crowd, and on front lawns all over the district, were signs that read, "No strangers in our Clearview schools."

CEA members, parents, students, NJEA members who lived in the school district, and other members of the community spoke passionately on behalf of this small group of workers, and it worked. The board backed down.

Educator quality and professional development

Recruitment, retention, and professional development
Members of the Seattle Education Association (SEA) and Washington Education Association started the National Board Certified Teachers (NBCT) Candidate Support Program Partnership, a program that helps teachers achieve National Board Certification. SEA also has a recruitment and retention program that involves the union in recruiting high-quality, diverse educators into the Seattle Public Schools. The Seattle Teacher Residency Program trains mentor teachers in teacher preparation and the recruitment of minority teacher candidates. SEA also jointly negotiated the Staff Training Assistance and Reflection (STAR) program to support new teachers.

Peer assistance and review
The San Juan Teachers Association (SJTA) and Montgomery County (Maryland) Education Association have worked with their respective administrations to develop and implement Peer Assistance and Review (PAR) programs to ensure teachers receive the training and support they need to be top-notch professionals. These programs allow fellow educators to as-

sist their colleagues in their professional development and make the Associations and the school districts jointly responsible for teacher quality.

The program developed by SJTA and the San Juan Unified School District in California provides assistance to any teacher who has not yet reached an acceptable performance level or who falls below acceptable standards. In the Montgomery County PAR program, MCEA takes equal responsibility with management for teacher quality and helps teachers meet standards and improve the overall quality of teaching, particularly in high-needs schools.

Teacher quality
The Evansville, Indiana, Equity Schools initiative was created by union leaders and district administrators to provide professional development and greater autonomy for teachers in three struggling schools. The Evansville Teachers Association and the Evansville Vanderburgh School Corporation negotiated what they called an Equity Academy. To teach in these schools, where nearly 90 percent of the students qualify for free or reduced-price lunch, teachers are required to complete the academy. Those who do not choose to be part of this initiative are transferred to other schools, and vacancies are filled with teachers with a strong interest and commitment to the Equity Schools approach.

The academy topics include communication styles, decision making, and using data to raise student achievement. Teachers are paid to attend the academy, and they receive additional compensation upon satisfactory completion. This program provides the training and support that are essential to keep high-quality teachers in high-needs schools.

Professional compensation
The Portland (Maine) Education Association negotiated the Professional Learning Based Salary System (PLBSS) that awards teachers and other staff credits toward salary increases through professional learning, including college courses, continuing education units, district workshops, and individual, self-directed

professional learning or service activities. In its report on the program's impact, the University of Massachusetts at Amherst cited several important study findings, including:

- Increased opportunity for educators to collaborate and converse with colleagues about teaching and learning

- Greater sense among teachers of being valued as professionals

- Teachers seeing a significant improvement of their classroom teaching

- Better retention of teachers despite the challenging environment in which they work

A living wage
In Yakima, Washington, education support professionals shared their stories and pushed and pushed and pushed for years until they finally succeeded in achieving a living wage.

Respect and appreciation for all cultural backgrounds and languages

Bilingual education
The Academy of Language and Fine Arts, also known as "ALBA" (Academia de Lenguaje y Bellas Artes), is a teacher-led public charter school within the Milwaukee Public School District. Supported by the Milwaukee Teachers' Education Association (MTEA), ALBA operates on the conviction that bilingual students can reach their full potential academically when taught in English and Spanish.

ALBA challenges its students through rigorous academic studies, the integration of fine arts, and the development of critical thinking, problem solving, and creative abilities. Its curriculum is designed to recognize, value, and preserve students' cultural identity. The school partners with local arts organizations to provide enrichment opportunities in music, art, and dance. It also relies heavily on parental involvement as a vital component of students' success.

One of the highest achieving schools in Milwaukee, ALBA has been recognized as a Wisconsin School of Recognition, an honor given by the state for improving student achievement. MTEA President Bob Peterson says, "ALBA shows the power of teachers taking charge of their profession and provides an antidote to the cancerous growth of privately run McFranchise charters. These teachers built strong ties with the parents of their students and continue to promote bilingual, multicultural teaching that connects to their students' lives. The lesson is clear: We must build on the strengths of educators, parents, students, and community to improve our public schools. That is the road to student success."

Resources to support differentiated instructional practices

Using collective bargaining to fight for the schools students deserve

After a 23-hour mediation session, the Saint Paul Federation of Teachers settled a landmark contract that moves the Saint Paul Public Schools closer to providing the schools that students deserve. Among the student-centered provisions that SPFT was successful in negotiating were:

- Smaller classes

- A commitment by the district to hire at least 42 new FTEs, including more licensed media specialists, elementary counselors, school social workers, and nurses

- A district pledge to spend at least $6 million per school year to maintain and expand state dollars to help reduce waiting lists for its pre-school program

- An expansion of the parent-teacher home visit project

- Creation of a career pathway for educational assistants, many of whom are persons of color, to become certified classroom teachers

- An increase in the amount of the recognition stipend for teachers who earn their National Board Certification (NBCT), and time off and financial assistance for those pursuing certification.

- A 25 percent reduction in lost learning time due to testing and test preparation, as well as an agreement to work together to lobby state and federal authorities to reduce mandates for unnecessary testing

Access to health, wellness, nutrition, and counseling services

Vision services

Understanding that one in four students has an undiagnosed vision problem (source: American Optometric Association), MTEA partnered with Wisconsin Vision to provide free eye exams and eye glasses to scores of low-income students.

School breakfast

Support staff, teachers, administrators, and the community worked together to implement a school breakfast program in the Trotwood-Madison (Ohio) School District.

Empowered educators and increased collaboration

Parent partnerships

Denver's teacher-led Math and Science Leadership Academy (MSLA) engages parents and other members of the school community in every aspect of school life. MSLA is a collaboration among teachers, their union (the Denver Classroom Teachers Association [DCTA]), and Denver Public Schools. In addition to traditional academics, students—90 percent Latino, 60 percent English language learners, and 90 percent eligible for free or reduced-price lunch—engage in hands-on learning and service learning projects, using knowledge gained in the classroom to conduct real-world, community-based projects. The school's vision includes a culture of deliberate partnerships with parents and community groups. By every measure used, the academic results have been impressive.

DCTA President Henry Roman summarizes his union's support: "One of the key strategies that makes MSLA work is the mutual agreement of all partners—families, educators, community—to set the bar high for our students. It's worth re-thinking your approach to involving parents, particularly if students aren't working up to their potential. What's even better is if your approach is grounded in what's been shown to work."

Home visits
The Parent/Teacher Home Visit Project (PTHVP) is a nationally recognized nonprofit organization with a track record of building strong connections between families and teachers. It was founded a decade ago by a collaboration of the Sacramento City Teachers Association (SCTA), the school district, and a faith-based community organizing group. Teachers who choose to participate are trained by a cadre of parents and teachers and then pair up to visit their students' homes.

This model of family engagement is ending the cycle of blame between families and school staff by building trust and respect, instilling cultural competency, and increasing personal and professional capacity. The results are impressive. Attendance rates are up, discipline problems and suspensions are down, and student academic achievement has improved. Additionally, teachers report higher job satisfaction and families say they feel more engaged and appreciated.

SCTA was involved from the outset. Members helped develop the program and they continue to serve on its Board of Directors. A Memorandum of Understanding between the Association and the district codified training and compensation agreements. Teachers receive one hour of compensation for each visit.

Stephanie Smith, Oakridge Elementary, states, "In my tenth year of teaching and my sixth year conducting home visits in our district, I can tell you confidently, any success I have seen in my classroom is directly related to the connections made with families at home."

Katrina Ramos, Isador Cohen Elementary, adds, "I have been teaching now for 13 years and I must say that home visits are the number one way to make

connections with our students and families. It empowers everyone to work together as a team."

This model has been adopted and adapted by schools and districts in 13 other states.

Community-School Program
The Center for Family, School, and Community Partnerships in the Evansville, Indiana, Vanderburgh School Corporation houses multiple wraparound services furnished by local organizations. The services include everything from free wellness, medical, and dental care to preschool, afterschool, and summer programs. They augment the work of teachers, nurses, counselors, and other school staff.

The Community-School program also helps families with college entrance and financial aid education, early childhood education services, bullying prevention, and removing language barriers.

The Evansville Teachers Association has members that sit on many of the committees that put the programs together. Members assist in creating and running programs.

"I believe our outreach to the community builds stronger connections between families, communities, and schools," states Dan Hartz, UniServ Director, Indiana State Teachers Association.

Teacher-led schools
The Reiche School is a teacher-led and operated school in Portland, Maine. The school purposely does not have any administrator presence in the building. Forty percent of the school's 357 students qualify for free or reduced lunch, and about 130 students enter and leave the school each year.

After about a year of joint labor-management exploration and research, which included many meetings with parents, the staff determined that it could move forward without an administrator in the building. The school's management structure consists of lead teachers, a leadership team, and standing committees.

Staff makes all decisions, from evaluations to student discipline. Along with an active and supportive union,

the Portland Education Association (PEA), the Reiche School also has an active parent-teacher organization. This structural change has resulted in higher rates of teacher retention and improved student attendance.

The school, PEA, and the Maine Education Association are lobbying to remove from existing law the requirement that every school must have a principal in the building.

Community engagement through internal and external capacity building

The Washington Education Association (WEA) is building a statewide education quality network focused on linking traditional advocacy and organizing with member rights and professional practice. It trains staff and members to become empowered leaders and advocates. WEA recommends that every student-centered advocacy effort start with a survey of key local level stakeholders to tap into the priorities of school communities.

Contacts with school board members

The Omaha Education Association (Nebraska) trains pairs of educators (rank and file members, not just people who are already leaders in the association) to be School Board Contact Teams that have regularly scheduled information sessions with individual school board members. The educators are prepared to share the association positions on key issues and to bring back school board members' questions and concerns so they can be addressed. It is not a gripe session for members, but rather a way for them to play a greater role in the advocacy work of the Association.

Member voice

Wake County Education Association (North Carolina) heeded the call of a group of bus drivers who were not being treated well by the district (e.g., not being allowed into schools to use the restrooms and stay warm between runs). The Association helped the members learn how to advocate for themselves, and they ultimately got the district administration to change the rules and to agree to regular meetings with transportation department employees.

Through this work, bus drivers came to recognize the value of organizing. It has been enlightening for them to go through this process and finally have their voices heard.

Those who were not members joined. The Association put an article in the Raleigh newspaper about the driver meetings, and this increased member involvement.

The Association has also worked with these members in many other ways. They needed to learn about political processes and elections. Many of the transportation workers voted for the first time in this past election. The Association got them T-shirts. This was surprising to them; they thought only teachers would get Association T-shirts. The Association provided standards of behavior and professional development for them to clarify what it means to be a school transportation professional, thereby elevating the status of this education support profession in the community, district, and among their peers.

To sum it all up…

NEA understands that advocating for student needs and improving educators' professional working conditions are interconnected. Educators and students alike need safe, healthy, and respectful teaching and learning environments where all members of the school community work together to help young people develop and succeed. Our members and local affiliates are taking their negotiating and collaborating skills well beyond the customary issues of wages, hours, and working conditions; they are taking ownership of non-traditional issues that are tied to improving teaching quality and student learning. As you begin to engage in this vital student-centered work, know that you are not alone and we are partnering with you in achieving success for our students in school and in life.

As we partner together, if you would like more information on the stories included in this Toolkit or if you have stories of your own to share, please contact NEA's Collective Bargaining and Member Advocacy Department by e-mailing:

- **Charles Holmes at** cholmes@nea.org
- **Andy Jewell at** ajewell@nea.org

….We can then share your experiences to encourage and support other local associations engaged in this vital work.
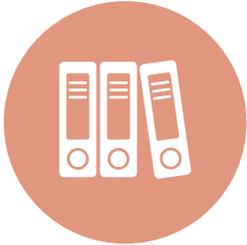
RESOURCES!

BARGAINING BENEFITS EVERYONE IN EDUCATION

This factsheet explores how bargaining can improve teaching and learning conditions, and stresses that through bargaining, "everyone connected to the school—students, teachers, education support professionals, administrators, and taxpayers—benefits."

BUILDING BROAD COALITIONS

Developing strong coalitions is crucial in any public education initiative. Many of the struggles to advance public education cannot be won by the Association alone—and all are made easier if we work with other segments of our communities. The pages in this tip sheet provide a guide to embarking on successful coalition work.

COLLECTIVE BARGAINING AND SCHOOL BOARD POLICY LANGUAGE EXAMPLES

Examples from actual NEA affiliate model contracts, collectively bargained local contracts, and school board policies that made changes to support student success.

COLLECTIVE BARGAINING: WHAT IT IS AND HOW IT WORKS

This factsheet includes a step-by-step outline of the bargaining process to demystify bargaining for those who aren't familiar with it. The factsheet emphasizes that collective bargaining is good public policy and gives workers a voice in their workplace.

COMMUNITY ORGANIZING SURVEY

We know that many of our members are already active in the community and could help us reach out to build partnerships. This non-threatening survey sample is provided as an initial option for your use to engage the community.

ESP ORGANIZING MANUAL

This training guide is designed to help Association members develop the skills needed to organize in a variety of situations.

HELENA EDUCATION ASSOCIATION COLLABORATES WITH COMMUNITY AND MANAGEMENT

The Professional Compensation Alternative Plan (PCAP) is an innovative program that was created to attract and retain the best possible educators. This document outlines the process in which the Helena Education Association collaborated with management and the community during negotiations to attract and retain quality educators.

IBB (Interest-Based Bargaining) FACT SHEET

Provides a brief description of what Interest-Based Bargaining is and how it can be used as an effective negotiation and collaboration strategy.

ORGANIZING FOR ACTION IN YOUR LOCAL ASSOCIATION

Developed by the Wisconsin Education Association Council (WEAC), Center for Collective Bargaining, Advocacy and Affiliate Relations, this is a resource guide for organizing, including a model organizational structure, roles, responsibilities, ideas for action, and tools for strategic planning.

POWER OF COMMUNITY: ORGANIZING FOR THE SCHOOLS ST. PAUL CHILDREN DESERVE

"However, this isn't just the story of a successful contract campaign. This is the story of a group of dedicated educators who, in the midst of a constant barrage of attacks, dramatically changed the conversation. It is the story of a union that knew that in order to bring about the transformation necessary for the betterment of the entire community they needed to transform the way in which they did business. It is a story of visionary and consistent leadership that built trust and delivered results. It is the story of parents, teachers, and community leaders coming together in partnership to find solutions. This is the story of the Saint Paul Federation of Teachers, how they won, and how they will continue to win for the kids and community that they serve."

PROFESSIONAL DEVELOPMENT BENEFITS STUDENTS

This factsheet focuses on the importance of professional development in the complex, ever-changing teaching profession. The factsheet summarizes key aspects of quality professional development and emphasizes that collective bargaining between teachers and their employers can create a culture of professional learning.

THE NEA PROFESSIONAL GROWTH SALARY FRAMEWORK

The principles outlined in these documents have been established to provide a framework for devel-oping professional growth salary schedules. A sample graphic is also provided.

REFRAMING THE EDUCATION DEBATE

Part of the National Message Project, this framework was developed to help strengthen the Association at both the state and national level by shaping the education reform message that is utilized to communicate with the external public. By telling our story, educators are able to reframe the debate in a way that benefits those who matter most, the children. After all, who better to set the direction and tone of the debate than those who do it every single day.

RULES FOR WRITING CONTRACT LANGUAGE

Some useful tips to help guide a bargaining representative/bargaining team when developing and considering contract proposals.

SWOT (STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS) OVERVIEW AND FORM

An important tool when developing your strategic advocacy plan, it can also be used in many other facets of the work that you do.

THE SCHOOLS ST. PAUL CHILDREN DESERVE

The research report developed from the recommendations and survey responses made by the parents, teachers, and community members for the Saint Paul Federation of Teachers (SPFT). The SPFT used this report as a basis for many of their bargaining proposals.

UNIONS AND BARGAINING: SETTING THE RECORD STRAIGHT

This factsheet discusses several hot-button issues, including public employee pay and benefits, tenure, seniority, and dues deduction and provides no-nonsense facts in response.

USEFUL SOCIAL MEDIA TOOLS

A handy list of some of the most widely used digital communication platforms such as NEA's EdVotes@nea.org, Facebook, Twitter, and YouTube.

NEA'S MY MEMBERS VAN: MEMBERSHIP AND ORGANIZING

The VAN is the latest tool to increase the precision and power of our outreach and to recruit, grow, and mobilize members. This system provides an array of tools that allow you to track and target members and potential members. If you would like additional information, training, or would like to request a user account, please contact ce.data@nea.org or c4odata@nea.org.

For copies of these resources, please contact NEA's Collective Bargaining and Member Advocacy department by e-mailing:

- Charles Holmes at cholmes@nea.org or Andy Jewell at ajewell@nea.org

For another avenue to share ideas and resources to improve student success, visit and become a member of our Student-Centered Advocacy group that is part of NEA's online Professional Practices Communities. Contact Dr. Barbara Hopkins, for online reference/access, bhopkins@nea.org, 202-822-7378.

HOW EDUCATORS CAN ADVOCATE FOR ENGLISH LANGUAGE LEARNERS – ALL IN!

America's fastest-growing student demographic is so disproportionately underserved by the public school system, the number of programs and dollars spent per English Language Learner is in decline even as the number of ELL students has skyrocketed. How can educators and other stakeholders fight for the rights of language-minority students? NEA's new guide, All In! How Educators Can Advocate for English Language Learners (http://www.nea.org/assets/img/template/docIcon_pdf.png PDF, 853 KB, 44 pgs.), offers strategies, resources, and step-by-step instructions for navigating the real-life issues educators encounter every day. http://www.nea.org/hcr