

Resources for Developing a Strong Leadership Structure

**BUILDING
STRONG
LOCALS**



Indiana
State
Teachers
Association

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Where Are We: Strong Leadership Structure

Let's reflect!

Building a Foundation

- ☐ Union holds regular meetings for leaders and members.
- ☐ Union has a constitution and bylaws.
- ☐ Every member has access to a copy of the constitution and bylaws.
- ☐ There is a committee structure in place.
- ☐ A few people are doing the work of the union.
- ☐ Members know who their elected officers and representatives are.
- ☐ Union work is primarily transactional.
- ☐ Leaders can identify Union's strengths and areas for improvement.
- ☐ Officers make the majority of decisions for the union.
- ☐ Expectations for every position are defined.
- ☐ Leaders utilize the expertise of the UniServ Director.

Moving to the Next Level

- ☐ Union holds effective meetings for leaders and members.
- ☐ Leaders have reviewed and updated local constitution and bylaws recently and amends them as needed.
- ☐ There is a leadership succession plan that constantly builds new leaders.
- ☐ Committees are empowered to do the work to which they are assigned.
- ☐ Many people are engaged in the work of the union.
- ☐ There is a robust nomination and election process.
- ☐ The Union has long-term and short-term goals.
- ☐ Major decisions are made with input by members.
- ☐ Expectations for every position are known and adhered to.

Becoming Aspirational

- ☐ The union reviews local constitution and bylaws yearly.
- ☐ Every member has a role.
- ☐ Union work is primarily transformational.
- ☐ Leaders and members on progress towards goals.
- ☐ Major decisions are made by the members.

You may find your local has foundational strengths, next level strengths, and aspirational strengths but not all strengths listed in a give category. That is okay. Use this reflection to help you work towards building a strong local. Your UniServ Director can help you develop the skills needed to strengthen your leadership structure.

Are We a Union?

An Activity for Determining What Kind of Organization We Are

Directions:

1. Cut up the following table so that each bullet is its own slip of paper.
2. Ask each member of the participating group (or divide into smaller groups) if we agree that the statement on the slip of paper reflects our organization. Place the slip of paper into one of two piles: "Yes, that reflects our organization," or "No, that is not like our organization." Remind the participants that the terms "management" and "administration" are interchangeable.
3. Repeat with each slip of paper.
4. Once each slip of paper has been reviewed, count how many slips of each color are in the Yes pile.
5. Reveal and discuss that blue slips represent typical industrial unionism, white represent a professional association, and orange represents a social justice organization.

Constructing "Progressive Unionism" Out of Three Frames

The "Three Frames" document was developed by the Mooney Institute for Teacher and Union Leadership July, 2005, for use in leadership training. A teaching tool and a work-in-progress, it may be used freely with attribution. Questions: Phone 240-603-6450.

Industrial Unionism	Professional Association	Social Justice Organization
<i>"Collective power to meet bread and butter needs and ensure fairness from management"</i>	<i>"Control of the profession to ensure quality"</i>	<i>"Equity for our students through active engagement in the community"</i>
ORIENTATION •Emphasizes separation of management and union roles in defining teacher work. "Boards make policy, administrators lead, teachers teach." •The role of the union is to limit what teachers can be asked to do and to increase the pay they get for doing it.	ORIENTATION •Emphasizes building professional learning communities and building the craft and the profession of teaching. •Union promotes and protects high quality teaching as a craft, resists threats to teacher professionalism and asserts teacher leadership. Conflicts between teachers and administrators can become de-emphasized.	ORIENTATION •Emphasizes alliances with parents and the community to organize for social justice to help all children succeed – schools and the conditions around schools must both change to improve educational outcomes. •Race and class challenges and socio-economic segregation must be addressed if achievement gaps are to be narrowed.
VIEW OF MANAGEMENT •Assumes labor-management relations are hostile and adversarial. Defends teacher rights & responds to grievances. •Fights for teacher priorities and standard of living in the budget. Organize teachers as an independent force.	VIEW OF MANAGEMENT •Values labor-management collaboration and partnership to improve and preserve public education and the profession. •Emphasizes programs and priorities to improve school quality and student achievement in the public interest.	VIEW OF MANAGEMENT •Management and labor are partners in engaging families, community and ethnic groups to build support for public education. •Advocate together for levy referenda, grants, foundation support, and to resist inequitable solutions based on race & class.
ROLE OF PARENTS •Parent outreach when we're in bargaining crisis or labor/mgmt. conflict. •Limit parent intrusions into the classroom to protect teacher autonomy.	ROLE OF PARENTS •Works with parents to improve individual parent support for their child's learning, but believes professionals have unique expertise.	ROLE OF PARENTS •Reaches out to community allies in strategic alliances to improve the quality of teaching and teacher cultural competency. •Seeks to maximize parent role in improving school effectiveness.

BARGAINING •Win/lose bargaining; •Limit scope of bargaining to bread and butter issues of salary, hours, and “working conditions.” •Views the teacher contract as way to institutionalize all changes.	BARGAINING •Broad scope and interest-based bargaining are a way to address teaching quality and support issues. •Agreements outside contract. •Contracts are a way to codify change once the bugs have been worked out.	BARGAINING •Infuse bargaining with concerns that address race, class, democracy, empowerment and equity issues. •Change can only be institutionalized and sustained by organizing rank-and-file members and the community.
DECISION MAKING Management prerogatives respected on a school and district level. Teachers grieve management decisions through their union.	DECISION MAKING Expands teacher decision-making and instructional leadership at school and district level. Joint decision making expands teacher and union ownership.	DECISION MAKING Democratic input by all stakeholders creates processes for institutionalized teacher, parent, and student empowerment.
TEACHING & THE ACHIEVEMENT GAP •Teachers have limited ability to control conditions that cause the gap. If students come to school unable or unwilling to learn, or if school conditions aren’t adequate, teachers must not be blamed. •Efforts to close the achievement gap must not be based on unreasonable expectations and the union’s role is to ensure that training and accountability measures don’t contribute to an unsustainable working and learning environment.	TEACHING & THE ACHIEVEMENT GAP •Quality teaching is critical to closing the achievement gap. It is possible to define and measure quality teaching. The union’s role is to make sure good methods are used, and that tools like “value-added- modeling” are used judiciously and carefully. •Union takes a leadership role in improving the quality of teaching/learning and professional development.	TEACHING & THE ACHIEVEMENT GAP •Belief in “effort-based intelligence”--all students can learn if adequate resources are equitably distributed and available. •Cultural competency/proficiency for teachers to reach all students. •School district funding, equitable distribution of accomplished teachers and school resources are priorities.
TEACHING WORKING CONDITONS •The union works to improve conditions of teaching (Class size, adequate text books and supplies, hours, etc.) •Union emphasizes protection of teachers’ rights – files grievances to resolve conflicts. •Seniority provisions are the best protection against employer favoritism.	TEACHING WORKING CONDITONS •The union is willing to take control of the improvement of teaching, support for teacher effectiveness, and quality control in the profession. •Alternatives to seniority-based transfer, assignment and layoff procedures are developed by the union to balance needs of younger and older teachers and the program needs of the educational enterprise.	TEACHING WORKING CONDITONS •Assignment of teachers to schools ensures high-quality, experienced teachers in hard-to-staff schools. •The union supports preferential teaching and learning conditions (e.g. lower class sizes) for high poverty schools. •Seniority-based reductions in force will be modified by the union so as not to disproportionately impact high-poverty, high-turnover schools.
CURRICULUM, INSTRUCTION & ASSESSING STUDENT LEARNING •Primary role of union is to improve wages, benefits, retirement, and equal treatment for all members. •Curriculum, professional development, assessment and grading policy are the responsibility of the district management. •Teachers are responsible for teaching and students are responsible for learning. •Teachers must not be evaluated primarily based on student test scores because that unfairly and inaccurately credits teachers for low performance that has other causes.	CURRICULUM, INSTRUCTION & ASSESSING STUDENT LEARNING •Union promotes additional responsibility and pay for teacher instructional leaders. •Union brings the teachers’ voice to the design, implementation and evaluation of curriculum, assessment and instruction. •The role of student test scores and other factors in teacher evaluation is negotiated and monitored by the union. •Union accepts necessary role of student achievement/learning in teacher and school accountability, because that is how public schools are judged.	CURRICULUM, INSTRUCTION & ASSESSING STUDENT LEARNING • Union safeguards teachers’ role in promoting critical thinking, critical pedagogy, and a broad curriculum, not aimed primarily at standardized tests. •Teachers encouraged to make curriculum relevant to students’ lives and to incorporate student’s lives into learning – cultural competence. •Union advocates for a “Broader Bolder Approach” to building a movement to improve the social context for schooling – health care, jobs, housing, etc.

Group Decision Making

Affinity Diagrams & Pareto Voting

What Are Affinity Diagrams and Pareto Voting?

Affinity diagrams are a way soliciting input and suggestions from a large group of people that allows each person to be heard and allows the group to see trends. Pareto voting is a technique for prioritizing criteria, determining which of the identified items should be addressed first, and selecting which of the strategies or solutions to implement. It is based on the Pareto principle: approximately 20% of the items brainstormed or developed by the group will be chosen by approximately 80% of the group's participants.

Group Size

No limit

When To Use

This technique works best when participants have a good understanding of the concepts and methodology behind the problems being studied, but not much time to determine priorities. The tool can also be used when a visual display of priorities is desirable to promote discussion.

Materials Needed

- ✓ Chart paper or large sticky notes
- ✓ Sticky notes of regular size
- ✓ Easel or place to hang chart paper
- ✓ Colored markers
- ✓ Self-adhesive half-inch dots

Instructions for the Facilitator

1. Ask each participant to brainstorm answers to a particular question putting one answer on each sticky note. Examples of questions include:
 - determining the strengths of a Local
 - determining areas of improvement for a Local
 - determining opportunities for member engagement
 - what you love about your job
 - what frustrates you about your job
 - solutions for making the job better
 - top priorities for the Local



2. Have each participant put their sticky note responses on a wall or chalkboard.
3. Ask some members of the group to sort the sticky notes into groups or themes. After a few minutes, ask other members of the group to substitute in for those who begin the sorting. Ask the final group of sorters to write category names for each groups or theme on a larger sticky note or chart paper.
4. Present the list of categories, making sure that all categories are clearly stated and understood.
5. Multiply the total number of categories by 0.20. Round up the result of this calculation to the next whole number. This will be the number of times each participant may vote for the highest priority category. For example, if the team brainstormed 10 ideas, because $10 \times 0.20 = 2$, each participant gets two votes.
6. Briefly discuss what criteria should be considered in determining the highest priority or have participants brainstorm to generate a possible list of criteria they can vote on. This may include which categories are the most urgent, which are the easiest to address, which the participant cares about most, etc.
7. Have participants vote by placing self-adhesive dots on the chart paper or large sticky notes next to those categories that represent their personal choices. (Participants may elect to use their votes either by placing all of their dots on the same category, splitting them based upon their personal priorities, or using only one vote per item. This decision should be made by the facilitator and group ahead of time.)
8. The options that receive the most votes from the group are those most likely to have the greatest support.
9. You can now use this data for a variety of purposes including:
 - Setting 1-year, 2-year, and 3-year goals
 - Share with administration if results include climate issues
 - Develop high-priority discussion topics





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What Is Our Structure?

Analyzing Your Local's Structures

Directions:

1. Make a list or draw the current structure of the Local
2. Ask the following questions:
 - a. What's working?
 - b. What's not working?
 - c. What's not getting done?
 - d. What's missing?
 - e. Does our structure match our goals and priorities?
3. Suggest possible changes to the structure of the Local.
4. Amend the Local constitution and bylaws to reflect the changes.

Examples of Local Structure

Note: Local names have been changed.

Fountain Park Education Association

All positions are elected. Has an Executive Board whose positions are in red.

President	Sick Leave Bank Committee (1 per building)
Vice President	Evaluation Committee (1 for every 10 members in a building, committee elects chair)
Secretary	Insurance Trust Representative
Treasurer	Local Political Action Committee Representative
Building Representatives (1 for every 10 members in a building)	District Council Representative(s)
Membership Committee (1 for every 12 members in a building, committee elects chair)	Delegates to the ISTA Representative Assembly
Bargaining Committee (1 for every 10 members in a building, committee elects chair)	Investment Committee Representative (2)
Discussion Committee (1 for every 10 members in a building, committee elects chair)	

Monterey Teachers Union

All positions are elected. Has a Leadership Team whose positions are in red.

President/Co-Presidents	Discussion Committee (1 for every 10 members in a building)
Vice President of Bargaining	Sick Leave Bank Committee (3 members)
Vice President of Discussion	Insurance Trust Delegate
Vice President of Membership	District Council Delegate(s)
Secretary	
Treasurer	



Association Reps (1 for every 10 members in a building)
Bargaining Team (1 for every 10 members in a building)

ISTA Representative Assembly
Delegate(s)
Local Political Action Committee
Delegate(s)

Tefft Education Association

All positions are elected. Has an Executive Board.

President/Co-Presidents
1st Vice President of Grievance
2nd Vice President of Membership & Political Action
Recording Secretary
Corresponding Secretary
Treasurer
Association Representatives (1 for every 12 members in a building)
District Council Delegates
Delegates to the ISTA Representative Assembly
Delegate(s) to NEA Representative Assembly
Bargaining Team (1 for every 12 members in a building)
Discussion Team (1 for every 12 members in a building)

Insurance Committee (1 for every 12 members in a building)
Evaluation Committee (1 for every 12 members in a building, committee elects chair)
Technology Committee (1 for every 12 members in a building, committee elects chair)
Curriculum Committee (1 for every 12 members in a building, committee elects chair)
Grievance Committee (1 for every 12 members in a building, committee elects chair)
VEBA Committee (1 for every 12 members in a building, committee elects chair)

Yeoman Classroom Teachers Organization

All positions are elected. Has a Leadership Team.

President/Co-Presidents
Vice President of Member Representation
Vice President of Membership
Vice President of Bargaining
Vice President of Discussion
Vice President of Scholarship Fund
Vice President of Sick Leave Bank
Vice President of Evaluation
Secretary
Treasurer
Building Representatives (1 for every 10 members in a building, no less than 2)
Membership Committee (1 for every 10 members in a building, no less than 2)
Bargaining Committee (1 for every 10 members in a building, no less than 2)

Scholarship Committee (1 for every 10 members in a building, no less than 2)
Sick Leave Bank Committee (1 for every 10 members in a building, no less than 2)
Evaluation Committee (1 for every 10 members in a building, no less than 2)
Discussion Committee (1 for every 10 members in a building, no less than 2)
Insurance Trust Representative
Local Political Action Committee
Delegate
District Council Delegates
Delegates to the ISTA Representative Assembly
Delegate(s) to NEA Representative Assembly





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Who Does What?

Our Union Tasks and Responsibilities

Directions: Divide into small groups. For each task listed below, your group should mark the union role you think is responsible for the task. Then have each of the small groups share and decide as a large group which positions should be responsible for which tasks. Then make a document that clearly defines which of these tasks went to which role. You may want to also consider amending the union's constitution and bylaws to reflect these changes.

Who will . . .

1. preside at all meetings of the Local Association and the Executive Board/Leadership Team
2. be an ex-officio member of all committees
3. assume all duties of the president in case of absence, resignation, or death
4. coordinate training for building representatives on representing members when needed
5. assist building representatives when representing members when necessary and coordinate with the Local President on member representation issues when necessary
6. keep minutes of all meetings of the Local Association and the Executive Board/Leadership Team
7. notify members in advance of all Local Association and Executive Board/Leadership Team meetings
8. send emails to members on behalf of officers when requested
9. maintain the hard copy and digital files of the Local Association
10. provide to members a summary or minutes of Executive Board/Leadership Team meetings
11. have charge of all funds of the Local Association
12. maintain Association funds in a bank in the name of the Local Association with a/the President as a co-signer on the account
13. disburse funds as authorized by a vote the Executive Board/Leadership Team
14. be in charge of all ongoing membership campaigns
15. develop a budget for approval by the Executive Board/Leadership Team
16. maintain a current list of members and non-members
17. report current membership at each Executive Board/Leadership Team Meeting and to ISTA
18. coordinate training for bargaining team members when necessary
19. maintain communication with the superintendent about bargaining
20. call and coordinate meetings of the bargaining team
21. ensure communication between the bargaining team and members
22. organize the ratification meeting
23. coordinate training for discussion team members when necessary
24. maintain communication with the superintendent about discussion
25. call and coordinate meetings of the discussion committee
26. ensure communication between the discussion committee and members
27. perform building discussion with the building administrators
28. collect requests to the sick leave bank
29. organize meetings of the sick leave bank committee
30. communicate the decisions of the sick leave bank committee to appropriate parties
31. solicit feedback on the evaluation model
32. coordinate meetings of those working on the evaluation



33. communicate decision of those working on the evaluation to the Executive Board/Leadership Team and members
34. attend meetings of the insurance trust
35. communicate insurance trust decisions with Executive Board/Leadership Team and members as applicable
36. attend meetings of the area local political action committee
37. communicate decision of the local political action committee with the Executive Board/Leadership Team and members as applicable
38. represent Local Association at District Council meetings and report back from those meetings to the members
39. attend the one-day ISTA Representative Assembly, vote on matters before the assembly on behalf of Association Members, and report back information from the Representative Assembly to members
40. be responsible for representing members in meetings with administrators
41. assist members with inaccurate evaluations
42. collect applications for the Association scholarship
43. organize scholarship committee meetings to determine scholarship winners
44. organize someone to present the scholarship at Awards Night
45. ensure scholarship funds are distributed to recipients
46. compile & distribute the Association newsletter
47. answer a question or concern about salary and/or benefits
48. answer a question or concern about the evaluation tool
49. respond to requests to change the evaluation tool
50. file a grievance on behalf of a member
51. decide if a grievance should go to arbitration
52. notify members about how to donate to the Sick Leave Bank
53. solicit topics for district-wide Discussion
54. solicit topics for building Discussion
55. talk to nonmembers about joining the Association
56. solicit ideas/suggestions for bargaining



Sample Result of Who Does What Activity

President: shall preside at all meetings of the TLCTO and the Leadership Team and shall be an ex-officio member of all committees.

Vice President of Member Representation: shall assume all duties of the president in case of absence, resignation, or death, coordinate training for building representatives on representing members when necessary, assist building representatives when representing members when necessary, and coordinate with the President on member representation issues when necessary.

Vice President of Membership: shall be in charge of all on-going membership campaigns, maintain a current list of members and non-members, maintain a current email list of members, and report current membership numbers at each meeting of the Leadership Team.

Vice President of Bargaining: shall coordinate training for bargaining team members when necessary, maintain communication with the superintendent about bargaining, call and coordinate meetings of the bargaining team, ensure communication between the bargaining team and members, and organize the ratification meeting.

Vice President of Discussion: shall coordinate training for discussion team members when necessary, maintain communication with the superintendent about discussion, call and coordinate meetings of the discussion team, and ensure communication between the discussion team and members.

Vice President of Scholarship Fund: shall collect applications for the TLCTO scholarship, organize scholarship committee meetings to determine scholarship winners, organize someone to present the scholarship at Awards Night, and ensure scholarship funds are distributed to recipients.

Vice President of Sick Leave Bank: shall collect requests to the sick leave bank, organize meetings of the sick leave bank committee, and communicate the decisions of the sick leave bank committee to appropriate parties.

Vice President of Evaluation: shall solicit feedback on the evaluation model, coordinate meetings of the evaluation committee, and communicate decision of the committee to the Leadership Team and members.

Secretary: shall keep minutes of all meetings of the TLCTO and the Leadership Team, shall notify the President if any elected member of the Leadership Team resigns or forfeits their membership on the Leadership Team, shall notify members in advance of all TLCTO and Leadership Team meetings, shall send emails to members on behalf of other officers when requested, shall provide to members a short summary of Leadership Team meetings, and shall maintain the hard copy and digital files of the TLCTO.

Treasurer: shall have charge of all funds of the TLCTO, shall maintain them in a bank in the name of the organization with the President as a co-signer on the account, and shall disburse funds as authorized by a vote the Leadership Team, and shall develop a budget for approval by the Leadership Team and provide account balances at each meeting of the Leadership Team.

District Council Delegates: shall represent TLCTO at District Council meetings and report back from those meetings to the members.

Delegates to the ISTA Representative Assembly: shall attend the one-day ISTA Representative Assembly, vote on matters before the assembly on behalf of members, and report back information from the Representative Assembly to the members.

Building Representatives: shall be responsible for representing members in meetings with their principals and shall assist with membership.

Committee Members: shall be responsible for scheduling and attending meetings and relaying information back to the Leadership Team.



Who Do I Talk To?

Guiding Members to the Correct Union Leader

Directions: As an executive board/leadership team, decide to which union leader a member should speak to about the topics on the left. Then update the chart with those leaders. Be sure to also share with members a list of who is currently filling which role in your union and a list of the mandatory subjects of Discussion. Print the final copy on 8.5"x14" paper and distribute to members.

	Start with . . .	If it doesn't get resolved, next go to . . .	Finally, if it's still not resolved, go to . . .
I have a question or concern about salary and/or benefits.	A bargaining team member in your building	Your association rep/building rep	The Local President
I have a question or concern about the evaluation tool.	An evaluation team member in your building	Your association rep/building rep	The Local President
My evaluation is inaccurate.	An evaluation team member in your building	Your association rep/building rep	The Local President
I would like to get our evaluation tool changed.	An evaluation team member in your building	Your association rep/building rep	The Local President
I need representation/assistance in a meeting with administration/school board.	Your association rep/building rep	The Vice-President of Member Representation	The Local President
I would like to apply to use or have a question about the Sick Leave Bank.	A Sick Leave Bank Committee member in your building	The Vice-President of the Sick Leave Bank	The Local President
I have a question or concern related to one of the attached mandatory discussion items.	A Discussion team member in your building	The Vice-President of Discussion	The Local President
I have a great idea for our union.	Your association rep/building rep	The Local Vice-President	The Local President
I need a membership form for someone.	A Membership Committee member in your building	The Vice-President of Membership	The UniServ Assistant
I need to change my dues payment method.	Call 844.ASK.ISTA or email askista@ista-in.org		



I would like something negotiated into a future contract.	A bargaining team member in your building	The Vice-President of Bargaining	The Local President
I have been accused of child abuse by a student or parent.	Immediately contact your Local President		
I would like information about our local union's scholarship fund.	A Scholarship Committee member in your building	The Vice-President of Scholarship	The Local President
I would like to know more about what is going on at the state and national level.	Our District Council Delegate	Our ISTA Board of Directors Member	The ISTA President
I would like to change an aspect of our state union.	Our District Council Delegate	Our ISTA Board of Directors Member	The ISTA President or bring a motion to the ISTA Representative Assembly
I would like to change an aspect of our national union.	ISTA's members on the NEA Board of Directors	The NEA President	Bring a motion to the ISTA Representative Assembly



All-Committee Organizational Meeting

Give Our Committees a Kick-start

Directions: Gather each of the union committees in one place but with separate meeting spaces (like neighboring classrooms) and have them complete the following tasks.

Objectives for the Next Hour

1. Elect a committee chair
2. Elect a committee secretary
3. Come up with a list of priorities for the rest of the year including determining if training is needed
4. Have committee chair email appropriate administrator to see if they can meet with the committee on X date.

Committee_____

Committee Chair _____

Committee Secretary_____

Our priorities for the rest of the year:

Possible meeting dates we're sending to administration_____



Constitution & Bylaws Checklist

Making Sure the Constitution & Bylaws Meets Our Needs

Directions: As an executive board/leadership team or in small groups, compare this checklist to your Constitution & Bylaws. Check the items that the group decides to be add or change and note what they should now say.

Local Association: _____

	We need to add/change this	Comments
What is the name of the Association?		
What is the Association's purpose?		
Who can be a member?		
Do we have honorary/reserved membership? If so, how does one become that?		
What are members' rights?		
When is a member considered "in good standing"?		
When will someone's membership be cancelled?		
When and by what means can a member cancel their own membership?		
Can membership be denied to any member for discriminatory reasons?		
Is there a guarantee of due process for those who are censured, suspended or expelled from the Association?		
Who has voting privileges?		
When is a membership year?		
What officers does your Local have?		
How are ballot nominations handled?		
When are elections?		
Is there a description of the responsibilities of each officer?		
What happens if a vacancy occurs outside of the election cycle?		
Who presides at meetings?		
What do you call your group of officers and possibly others (Board? Executive Board? Leadership Team?) and who is included?		



How are members who serve in committee positions determined?		
Is there a break-down of numbers of committee positions (a ratio of 1 representative for every 15 members in a building)?		
Does it allow for or mandate Co-Presidents or can you only have one President?		
What are the duties of the President(s)?		
Is the President(s) an ex-officio member of all committees and if so, is it a voting or non-voting membership?		
What are the duties of any Vice-Presidents?		
What are the duties of any Secretaries?		
What are the duties of any Treasurers?		
Who keeps the minutes at meetings?		
Are the minutes distributed, on what timeline, and to whom?		
Where are Association documents stored?		
How are bills paid and is there an approval process?		
Who and how many people sign the checks?		
How is the District Council delegate(s) determined?		
Does the Association have a budget and if so, who develops and approves it?		
What happens when an officer is negligent or excessively absent from duties?		
What are the term lengths of each officer and if more than one year, which years do elections occur for each position?		
Is the list of candidates announced before the election?		
Are candidates allowed to send out statements or campaign before the election?		
Shall elections be done by secret ballot?		
Are absentee ballots allowed and if so, by what means?		
How is ballot counting done?		

How is a win determined (one more vote than the opponent(s) versus a majority of votes versus a majority of members)?		
What happens in the event of a tie?		
When shall those elected assume their duties following an election?		
How are Association Representative determined such as elected or appointed?		
What are the duties of an Association Representative?		
How are Membership Committee members appointed/elected?		
How are Bargaining Team members appointed/elected?		
What authority does the Bargaining Team have?		
How are Discussion Team members appointed/elected?		
How are Building Discussion Team members appointed/elected?		
How are Grievance Committee members appointed/elected?		
How are Sick Bank Committee members appointed/elected?		
What other standing committees exist that are solely Association members, how are committee members determined, and what are their duties?		
How are Ad-Hoc committees established and members appointed/elected?		
How are committee chairs appointed/elected?		
Are committee chairs to attend executive committee meetings?		
What is the length of committee members' terms and when do they begin?		
What happens in the event of a committee vacancy?		
How are delegates to the ISTA Representative Assembly chosen?		
How are delegates to the NEA Representative Assembly chosen?		
Are the financial documents of the Association audited and if so, how does this process work?		

Is affiliation with ISTA and NEA listed?		
How does one change the Constitution and Bylaws?		
What happens to Association assets if the Association dissolves?		
How shall meetings be conducted, for example using Robert's Rules of Order?		
What is a quorum such as is it a percentage of members or a percentage of members present?		
How is the Collective Bargaining Agreement ratified?		
Is the ratification done by secret ballot?		
Does the ratification require a quorum?		
When are General Membership meetings held and how often?		
How are local dues changed?		
Is there a provision encouraging minority involvement or establishing a minority affairs committee?		

Other items for consideration . . .



Essential Local Financial Procedures

Local leaders can use the following four focus areas to quickly and easily to strengthen the financial health of our Association. These areas are the easiest and most effective ways to prevent and detect issues.

1. Ensure that appropriate people have access to bank and financial accounts.

Know who the authorized signers are on the local bank and financial accounts and review them regularly. Change signers immediately when new people become local leaders. At least two local officers must have local account access.

2. Complete bank reconciliations monthly. Have them reviewed and signed by someone other than the person completing the reconciliation.

A basic bank reconciliation identifies the differences between the checkbook/ledger balance and the bank account balance. It calls out any outstanding transactions and reconciling items (differences or discrepancies). A simple report is generated, and the actual bank statement should be attached.

After completing this process, give the reconciliation packet to another person in the local to review and sign. The second person should review the reconciliation and look specifically at the transactions on the bank statement. This review process should be completed as soon as possible after the reconciliation is prepared each month. Keep the signed/initialed copy with the local's financial records for seven years, the document retention time for these financial records.

To make this financial control even stronger, have someone other than the person reconciling the bank accounts receive, open and review bank statements. This can be achieved by having the bank mail statements to this person or by granting them online access to bank accounts.

3. Have tight controls over disbursements of local money.

- No debit cards.
- No cash withdrawals.
- Require detailed receipts or other documentation for all transactions.
- Disbursements should only be made for Association business. All disbursements made should fit within the local's guidelines and budget. If they do not, then specific approval from the local's governing board should be obtained prior to making the disbursement.
- Have a voucher system for payments. Vouchers should be approved by at least one officer. At no time should a voucher be approved by the person being paid. For each expense, the voucher should answer the **five W's**:



- **Who** was the purchaser/who was there?
- **What** was purchased (detailed receipt).
- **When** was the purchase made/expense incurred?
- **Where** was the purchase?
- **Why** was it purchased (the business purpose)?

Two signers on checks is preferable. Locals with strong voucher systems in place, where approval is clear prior to disbursements being made, can require only one signer on checks. Checks should always be signed by someone other than the person being paid.

If it is necessary to have an Association credit card, tight controls on how the card is used must be in place. When possible, advanced approval for purchases should be obtained. Only use the card when there are no other viable options for payment.

4. Have a budget each year. Present financial reports at each local business meeting.

An annual budget is the plan for how local resources will be used to carry out the goals and work of the Association annually. A budget can be very simple or more complex depending on the size and needs of the local.

In addition to a budget, regular financial reports serve to share the financial status of the local and to demonstrate accountability in the managing of resources. As with a budget, financial reports can be simple or more complex depending on the size and needs of the local.

At a minimum, a financial report should show all resources of the local (cash, investments, other property, etc.) and any liabilities/debts, if applicable. The report should also compare the budget to all revenue the local has received (dues income, interest, etc.) and any expenses incurred to date.

ISTA Resources

Take advantage of ISTA's financial resource documents to assist in your planning. At ista-in.org/resources under "Local Treasurers" you can find several example documents including:

- A sample local budget and financial statement template
- A sample voucher located in the Local Treasurers Handbook and in the financial statement template
- A sample bank reconciliation

For additional assistance, please contact ISTA Treasurer.

What Kind of Union Do You Want to Be?

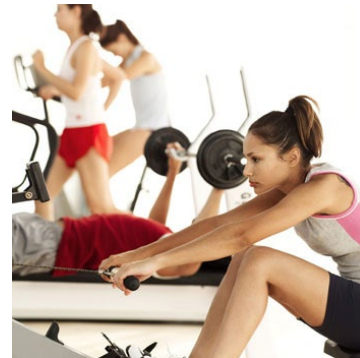
Transactional or Transformational?



Transactional?

Members pay dues in order to get desired service.

Responsive, self-interested, status quo, concentrated power, efficient, solve problems.



Transformational?

Members pay dues in order to participate and affect change.

Proactive, group interests, change, diffuse power, messy, create revolutions.

Where we were a year ago?

Transactional

Transformational

Where we are today?

Transactional

Transformational

Where we want to be in a year (be realistic)?

Transactional

Transformational

Moving towards Transformational

Transactional	Your Local Assessment 	Transformational
Reluctant to involve members in bringing pressure on the employer. Members have not built power. Union organization at the worksite is weak. Management takes advantage of this lack of unity and loss of confidence in the union.	1 2 3 4	Encourages initiative and creativity of members. Members are empowered and the union is better organized at the worksite. The more collective understanding and action, the more change is institutionalized and sustained.
Limits the scope of bargaining to team developed issues or individual issues. Does not utilize the power of discussion to have persuasive conversations on the working conditions impacting members.	1 2 3 4	Infuses bargaining with concerns from whole membership. Uses broader issues of working conditions to drive discussion.
Exclusive. Little turnover in leadership. Suspicious of newcomers. Small group of leaders handpicks participants.	1 2 3 4	Inclusive. Tries to reflect the workforce in the composition of union leadership. Democratic input by all stakeholders creates processes for institutionalized teacher, parent, and student empowerment.
Member expects president or rep to fix their problem. President or rep talks to the administration alone and settles issues without members present.	1 2 3 4	Member understands their responsibility to be part of the solution, asking what we can do to solve the problem. Organizer talks to other members about how the issue affects us all and members have a united message for administration.
Bargaining kept within small team. No bargaining support committee. Negotiations are kept secret until a settlement is reached.	1 2 3 4	Bargaining team works with bargaining support committee to build consensus. A transparent model for negotiations to maintain a constant flow of information to members.

Leadership in the Age of Complexity

From Hero to Host

Directions: Have the group (Leadership Team, Executive Board, reps, members, etc.) read the following article. Then have them rank their Local on a continuum of hero to host. Additionally, have each individual rank themselves on the hero to host continuum. Finally facilitate a discussion about what needs to change or to be done differently and what next steps can be taken.

Margaret Wheatley with Debbie Frieze ©2010 published in Resurgence Magazine, Winter 2011

For too long, too many of us have been entranced by heroes. Perhaps it's our desire to be saved, to not have to do the hard work, to rely on someone else to figure things out. Constantly we are barraged by politicians presenting themselves as heroes, the ones who will fix everything and make our problems go away. It's a seductive image, an enticing promise. And we keep believing it. Somewhere there's someone who will make it all better. Somewhere, there's someone who's visionary, inspiring, brilliant, trustworthy, and we'll all happily follow him or her. Somewhere...

Well, it is time for all the heroes to go home, as the poet William Stafford wrote. It is time for us to give up these hopes and expectations that only breed dependency and passivity, and that do not give us solutions to the challenges we face. It is time to stop waiting for someone to save us. It is time to face the truth of our situation-that we're all in this together, that we all have a voice-and figure out how to mobilize the hearts and minds of everyone in our workplaces and communities.

Why do we continue to hope for heroes? It seems we assume certain things:

- Leaders have the answers. They know what to do.
- People do what they're told. They just have to be given good plans and instructions.
- High risk requires high control. As situations grow more complex and challenging, power needs to shift to the top (with the leaders who know what to do.)

These beliefs give rise to the models of command and control revered in organizations and governments world-wide. Those at the bottom of the hierarchy submit to the greater vision and expertise of those above. Leaders promise to get us out of this mess; we willingly surrender individual autonomy in exchange for security.

The only predictable consequence of leaders attempts to wrest control of a complex, even chaotic situation, is that they create more chaos. They go into isolation with just a few key advisors, and attempt to find a simple solution (quickly) to a complex problem. And people pressure them to do just that. Everyone wants the problem to disappear; cries of "fix it!" arise from the public. Leaders scramble to look like they've taken charge and have everything in hand.

But the causes of today's problems are complex and interconnected. There are no simple answers, and no one individual can possibly know what to do. We seem unable to acknowledge these complex realities. Instead, when the leader fails to resolve the crisis, we fire him or her, and immediately begin searching for the next (more perfect) one. We don't question our expectations of leaders, we don't question our desire for heroes.

The Illusion of Control

Heroic leadership rests on the illusion that someone can be in control. Yet we live in a world of complex systems whose very existence means they are inherently uncontrollable. No one is in charge of our food systems. No one is in charge of our schools. No one is in charge of the environment. No one is in charge of national security. No one is in charge! These systems are emergent phenomena-the result of thousands of small, local actions that converged to create powerful systems with properties that may bear little or no resemblance to the smaller actions that gave rise to them. These are the systems that now dominate our lives; they cannot be changed by working backwards, focusing on only a few simple causes. And certainly they cannot be changed by the boldest visions of our most heroic leaders.

If we want to be able to get these complex systems to work better, we need to abandon our reliance on the leader-as-hero and invite in the leader-as-host. We need to support those leaders who know that problems are complex, who know that in order to understand the full complexity of any issue, all parts of the system need to be invited in to participate and contribute. We, as followers, need to give our leaders time, patience, forgiveness; and we need to be willing to step up and contribute.

These leaders-as-hosts are candid enough to admit that they don't know what to do; they realize that it's sheer foolishness to rely only on them for answers. But they also know they can trust in other people's creativity and commitment to get the work done. They know that other people, no matter where they are in the organizational hierarchy, can be as motivated, diligent and creative as the leader, given the right invitation.

The Journey from Hero to Host

Leaders who journey from hero to host have seen past the negative dynamics of politics and opposition that hierarchy breeds, they've ignored the organizational charts and role descriptions that confine people's potential. Instead, they've become curious. Who's in this organization or community? What skills and capacities might they offer if they were invited into the work as full contributors? What do they know, what insights do they have that might lead to a solution to this problem?

Leaders-as-hosts know that people willingly support those things they've played a part in creating-that you can't expect people to 'buy-in' to plans and projects developed elsewhere. Leaders-as-hosts invest in meaningful conversations among people from many parts of the system as the most productive way to engender new insights and possibilities for action. They trust that people are willing to contribute, and that most people yearn to find meaning and possibility in their lives and work. And these leaders know that hosting others is the only way to get complex, intractable problems solved.

Leaders-as-hosts don't just benevolently let go and trust that people will do good work on their own. Leaders have a great many things to attend to, but these are quite different than the work of heroes. Hosting leaders must:

- provide conditions and good group processes for people to work together.
- provide resources of time, the scarcest commodity of all.
- insist that people and the system learn from experience, frequently.

- offer unequivocal support—people know the leader is there for them.
- keep the bureaucracy at bay, creating oases (or bunkers) where people are less encumbered by senseless demands for reports and administrivia.
- play defense with other leaders who want to take back control, who are critical that people have been given too much freedom.
- reflect back to people on a regular basis how they're doing, what they're accomplishing, how far they've journeyed.
- work with people to develop relevant measures of progress to make their achievements visible.
- value conviviality and esprit de corps—not false rah - rah activities, but the spirit that arises in any group that accomplishes difficult work together.

Challenges from Superiors

It's important to note how leaders journeying from hero to host use their positional power. They have to work all levels of the hierarchy; most often, it's easier to gain support and respect from the people they lead than it is to gain it from their superiors. Most senior leaders of large hierarchies believe in their inherent superiority, as proven by the position they've attained. They don't believe that everyday people are as creative or self-motivated as are they. When participation is suggested as the means to gather insights and ideas from staff on a complex problem, senior leaders often will block such activities. They justify their opposition by stating that people would use this opportunity to take advantage of the organization; or that they would suggest ideas that have no bearing to the organization's mission; or that people would feel overly confident and overstep their roles. In truth, many senior leaders view engaging the whole system as a threat to their own power and control. They consistently choose for control, and the resultant chaos, rather than invite people in to solve difficult and complex problems.

Leaders who do know the value of full engagement, who do trust those they lead, have to constantly defend their staff from senior leaders who insist on more controls and more bureaucracy to curtail their activities, even when those very activities are producing excellent results. Strange to say, but too many senior leaders choose control over effectiveness; they're willing to risk creating more chaos by continuing their take-charge, command and control leadership.

Re-engaging People

Those who've been held back in confining roles, who've been buried in the hierarchy, will eventually blossom and develop in the company of a hosting leader. Yet, it takes time for employees to believe that this boss is different, that this leader actually wants them to contribute. It can take 12 to 18 months in systems where people have been silenced into submission by autocratic leadership. These days, most people take a wait-and-see attitude, no longer interested in participating because past invitations weren't sincere, or didn't engage them in meaningful work. The leader needs to prove him or herself by continually insisting that work cannot be accomplished, nor problems solved without the participation of everyone. If the message is sincere and consistent, people gradually return to life; even people who have died on the job, who're just waiting until retirement, can come alive in the presence of a leader who encourages them and creates opportunities for them to contribute.

Leaders-as-hosts need to be skilled conveners. They realize that their organization or community is rich in resources, and that the easiest way to discover these is to bring diverse

people together in conversations that matter. People who didn't like each other, people who discounted and ignored each other, people who felt invisible, neglected, left out-these are the people who can emerge from their boxes and labels to become interesting, engaged colleagues and citizens.

Hosting meaningful conversations isn't about getting people to like each other or feel good. It's about creating the means for problems to get solved, for teams to function well, for people to become energetic activists. Hosting Leaders create substantive change by relying on everyone's creativity, commitment and generosity. They learn from firsthand experience that these qualities are present in just about everyone and in every organization. They extend sincere invitations, ask good questions, and have the courage to support risk-taking and experimentation.

Are You a Hero?

Many of us can get caught up acting like heroes, not from power drives, but from our good intentions and desires to help. Are you acting as a hero? Here's how to know.

You're acting as a hero when you believe that if you just work harder, you'll fix things; that if you just get smarter or learn a new technique, you'll be able to solve problems for others. You're acting as a hero if you take on more and more projects and causes and have less time for relationships. You're playing the hero if you believe that you can save the situation, the person, the world.

Our heroic impulses most often are born from the best of intentions. We want to help, we want to solve, we want to fix. Yet this is the illusion of specialness, that we're the only ones who can offer help, service, skills. If we don't do it, nobody will. This hero's path has only one guaranteed destination-we end up feeling lonely, exhausted and unappreciated.

It is time for all us heroes to go home because, if we do, we'll notice that we're not alone. We're surrounded by people just like us. They too want to contribute, they too have ideas, they want to be useful to others and solve their own problems.

Truth be told, they never wanted heroes to rescue them anyway.

Parts of this article are excerpts from Walk Out Walk On: A Learning Journey Into Communities Daring to Live the Future Now. Margaret Wheatley & Deborah Frieze. Berrett - Koehler Publishers, Forthcoming April 2011

Running an Effective Meeting

Keep It Purposeful

Why are you having a meeting?

If you don't have an answer, you don't need a meeting.

Meetings without purpose only serve to turn people off.

Best Practices

Before the Meeting

- Create an agenda.
- Review previous agendas for unfinished action items.
- Send agenda and reports in advance.
- Set goals for the meeting.
- Assign preparation for the meeting topics and logistics.

During the Meeting

- Start on time.
- End on time.
- Stick to the agenda.
- Have a method for people to submit off-topic items. ("parking lot")
- Include time for clarifying questions.
- Most of the meeting should be spend on progress on your goals with deliberation and decisions on actions.
- Keep moving.
- Consider breakout groups, when appropriate/useful.
- Assign a leader and a timeline to each action item.

After the Meeting

- Send out meetings notes/minutes ASAP.
- Send reminders of timelines on action items.
- Empower each leader of an action item to own their task.
- Ask for feedback about the meeting process and opportunities for improvement.

Don't

- Don't have meetings when everyone is unprepared.
- Don't have a meeting without a goal or purpose.

Ideas to Try

- Start your meeting with a positive share from everyone or a few volunteers to set the tone.

- Try a new location.
- Ditch the table and sit in a circle.
- Take a stretch break for those longer meetings.
- Don't allow laptops or tablets during discussion/deliberation.
- Toss a stuffed animal to whomever is speaking to help balance talk time.
- Use an affinity diagrams and pareto voting to help sort through which issue or topic is of most interest to the group (see section on affinity diagrams and pareto voting elsewhere in this manual).
- Use a google doc to keep track of who is in charge of each aspect of a meeting and of any action items that come from those meetings.

What type of meeting is it?

Small group (5-10 people)

Ex. Executive board, building team, negotiations team, discussion team, etc..

Useful for consensus building, diving deep in to a topic, and managing activities of the union.

Large group (10+ people)

Ex. Whole building, corporation-level meeting, etc...

Useful for sharing information, getting agreement/disagreement on discreet topics, building connections across groups

10-minute stand-up meeting

Useful for sharing quick information and ending with an "ask"

Ex. Post bad bargaining session, share out what occurred, and ask for attendance at next board meeting.

Executive board meeting

Monthly meeting to go over action items, approve budget expenditures, prepare for large member meetings.

All member meeting

Used for voting on contract, constitution/bylaw reaffiliation or changes, election of officers, sharing of corporation level information, creating connections.

Decision Making Options

An In-Depth Look

Consensus

Involves everyone clearly understanding the situation/problem, all relevant facts, and jointly developing solutions. Lots of listening, healthy debate, and testing of options. Generates a decision that all can accept.

Pros- Collaborative effort that unites the group. Demands high involvement. Systematic, objective, and fact-driven. Builds buy-in and high commitment to the outcome.

Cons- Time-consuming and produces low-quality decision if done without proper data collection or if members have poor team interaction skills.

Uses- When decisions will impact the entire group; when buy-in and ideas from all members are essential; when the importance of the decision is worth the time it will take to complete the process properly.

Majority Voting

Involves asking people to choose the option they favor, after clear choices have been identified. Usual methods are a show of hands or secret ballot. Quality of voting is enhanced if there is good discussion prior to taking a vote.

Pros- It's fast. Decisions can be of a higher quality if preceded by a thorough analysis.

Cons- It can be too fast and low in quality if people vote based on personal feelings, without hearing each other's thoughts or facts. It creates winners and losers, potentially dividing the group. Show of hands method may put pressure on people to conform.

Uses- When there are two distinct options and one must be chosen; when decisions must be made quickly, and a division in the group is acceptable; when consensus has been attempted and cannot be reached.

Multi-voting

This is a priority-setting tool that is useful in making decisions when the group has a lengthy set of options before them. Ordering the options, based on a set of criteria, will clarify the best course of action.

Pros- It's systematic, objective, democratic, non-competitive, and participative. Everyone wins somewhat and feelings of loss are minimal. It's a fast way of sorting out a complex set of options.

Cons- It's often associated with limited discussion, hence, limited understanding of the options. This may force choices on people that may not be satisfactory to them, because the real priorities do not rise to the surface or people are swayed by each other if the voting is done out in the open rather than by ballot.

Uses- When there's a long list of alternatives or items from which to choose; or when choosing a set of criteria to identify the best course of action.

Compromise

A negotiated approach applicable when there are two or more distinct options and members are strongly polarized (neither side is willing to accept the solution/position put forth by the other side). A middle position is then created that incorporates ideas from both sides. Throughout

the process of negotiation everyone wins a few of their favorite points but also loses a few items they liked. The outcome is, therefore, something that no one is totally satisfied with. In compromises no one feels they got what they originally wanted, so the emotional reaction is often "It's not really what I wanted but I'm going to have to live with it."

Pros- It generates lots of discussion and does create a solution.

Cons- Negotiating when people are pushing a favored point of view tends to be adversarial, hence this approach divides the group. In the end everyone wins, but everyone also loses.

Uses- When two opposing solutions are proposed, neither of which is acceptable to everyone; or when the group is strongly polarized and compromise is the only alternative.

One Person Decides

This is a decision that the group decides to refer to one individual to make on behalf of the group. A common misconception among teams is that every decision needs to be made by the whole group. In fact, a one-person decision is often a faster and more efficient way to get resolution. The quality of any one person's decision can be raised considerably if the person making the decision gets advice and input from other group members before they decide.

Pros- It's fast and accountability is clear.

Cons- It can divide the group if the person deciding doesn't consult, or makes a decision that others can't live with. One person's decision typically lacks in both buy-in and the synergy that comes from a group decision-making process.

Uses- When the issue is unimportant or small; or when there's a clear expert in the group; or when only one person has the information needed to make the decision and can't share it; or when one person is solely accountable for the outcome.

Unanimous

This happens occasionally when there's a solution that is favored by everyone and 100% agreement seems to happen automatically. Unanimous decisions are usually made quickly. They are rare and often occur in connection with trivial or simple issues.

Pros- It's fast, easy, everyone is happy, and it unites the group.

Cons- May be too fast; perhaps the issue actually needed discussion.

Uses- When lack of discussion isn't vital (i.e., issues are trivial) or when issues are not complex, requiring no in-depth discussion.

Based on material from Facilitating with Ease! by Ingrid Bens

Sample Executive Board Agenda

TEFFT EDUCATION ASSOCIATION EXECUTIVE BOARD AGENDA

January 18, 2021 at 4:30 Central
Room 204, Tefft High School

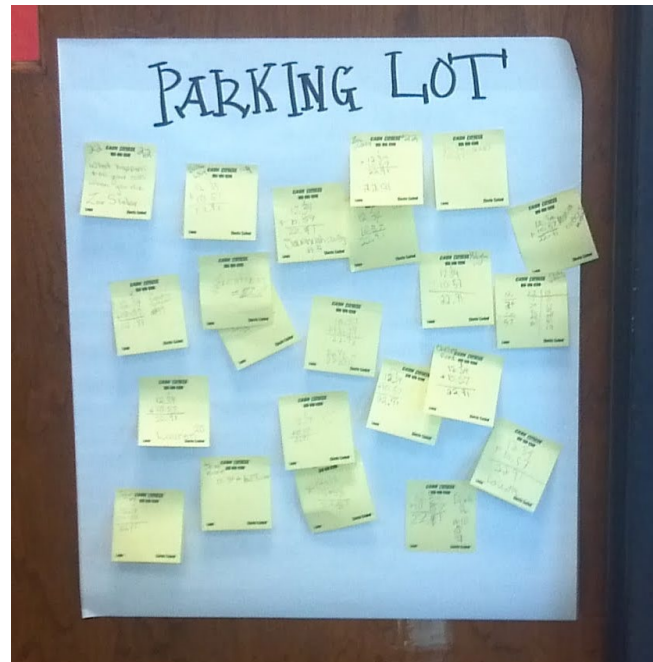
1. Adoption of the Agenda with Flexibility
2. Woohoo! Moments – *Sharing things that have occurred in the last month that we should take a moment to celebrate.*
3. Reports – *The following reports were submitted via our shared Google folder one week before the meeting. This time is for clarifying questions or potential corrects to those reports. We will not be reading the reports during the meeting.*
 - a. Questions and Clarification on any of the following:
 - i. Secretary's Report
 - ii. Treasurer's Report
 - iii. President's Report
 - iv. Tefft Elementary Association Reps Report
 - v. Tefft Middle School Association Reps Report
 - vi. Tefft High School Association Reps Report
 - vii. Discussion Chair's Report
 - viii. Insurance Chair's Report
 - ix. Bargaining Chair's Report
 - x. Evaluation Chair's Report
 - b. Approval of the reports
4. Unfinished business/action items
 - a. Membership
 - i. Current membership counts
 - ii. Review of upcoming membership activities
 - iii. Suggestion for new activities
 - b. Results of Climate Survey
 - i. Review results of climate survey in aggregate and by building
 - ii. Make list of items where members show most dissatisfaction
 - iii. Determine a few items to initially address
 - iv. Develop plan to address these items
5. New business/action items
 - a. Election of a new bargaining team
 - b. Developing a bargaining support team who creates and implements a community organizing plan for bargaining.
 - c. Representation at school board meetings.
6. Dilemma Discussion
 - a. Format
 - b. Practice
7. Items from Parking Lot
8. Other

9. Upcoming Events

- a. This year's Executive Board Schedule, all at 4:30 Central at Tefft HS Room 204:
 - i. Wed Feb 8, 2021
 - ii. Wed Mar 8, 2021
 - iii. Wed Apr 12, 2021
 - iv. Wed May 10, 2021
- b. Northern Conference – February 17 & 18, 2021 at Swan Lake in Plymouth
- c. Collective Bargaining Conferences – Partial Days, Topics – Changes in law, changes in compliance, where to find the money
 - i. June 20 – South Bend and Scottsburg
 - ii. June 21 – Evansville and Lafayette
 - iii. June 22 – Indianapolis
 - iv. June 27 – Valpo
 - v. June 28 – Fort Wayne

Parking Lot

A parking lot is a place where meeting attendees can put off topic questions or topics to be addressed at a later point in the meeting.



Sample 10 Minute Meeting Agenda

Tefft Educaiton Association

10 Minute Meeting Agenda

Topic: RIF Discussion

1. Who was present at Discussion? (1 min)
2. Positions scheduled to be RIF'd (2 min)
3. Rainy Day, Cash Reserves, Capital Projects (2 min)
4. Other efficiency issues that may be considered (2 min)
5. Other issues (2 min)
6. What can you do? (1 min)
7. Dismiss

If you have questions, feel free to leave a written copy with the discussion committee members or to stay a few minutes longer and ask questions.

Thank you for coming! ☺

Dilemma Discussion

Solving Problems Efficiently & Effectively

1. Person 1 briefly describes dilemma in 2-3 minutes.
 - a. What is dilemma?
 - b. What would success look like?
2. All other people ask clarifying questions that do not include “Have you tried . . . ?”.
3. Person 1 sits back, listens, takes notes, and does not speak.
4. All other people dissect, discuss, or give ideas to move toward success.
5. Person 1 re-enters conversation and tells what they heard and will now try.

Team Development

Directions: Consider the following questions and discuss after reviewing the text.

1. Who is on your team?
2. Who do you want on your team?
3. Is there a difference between #1 and #2?
4. What happens when your team changes?

Characteristics of an Effective Team

- Inclusive
- Diverse
- Respectful of its members
- Facilitates decision-making
- Creative and responsive
- Shared responsibility across team
- Safe space
- Honest

Resolving Conflict within a Team

Accept

While you need not agree with the criticism of your idea, you do need to accept it is offered with sincerity.

Avoid making statements that appear to be put-downs or ridicule.

Make it a group issue

If you hang back from defending your idea, you may be pleasantly surprised to hear someone else take up the defense.

Answer

If group discussion of your idea misses key points, you may want to respond to some of the disagreement.

Do this by addressing the group, not your critic.

Relax

When you are relaxed, you listen and think more clearly. Breathe.

Listen

Listen without judging or assuming.

Facilitation & Effective Questioning

How Facilitation Can Help a Team

Facilitation is a process for helping the leadership team get its work done. A facilitator can be someone the team asks for assistance or a team member(s) who agree(s) to be neutral. The team leader usually maintains that role while someone else acts as facilitator. The facilitator can do the following:

- Help the group define its overall goal, as well as specific objectives.
- Help members assess their needs and create plans to meet them.
- Provide processes that help members to make high quality decisions.
- Guide group discussion to keep it on track.
- Make accurate notes that reflect the ideas of members.
- Help the group understand its own processes to work more effectively.
- Support members in assessing their current skills as well as building new skills.
- Manage conflict.
- Help the group communicate effectively.
- Help the group access resources.
- Foster leadership in others.
- Teach others to facilitate.

Facilitation Practices

Stay Neutral on Content

Your job is to focus on the process role and avoid the temptation of offering opinions about the topic under discussion. You should use questions and suggestions to offer ideas that spring to mind but never impose your opinions on the group.

Listen Actively

Use attentive body language and paraphrase what people are saying. Make eye contact with people while they speak, when paraphrasing what they have just said, and when summarizing their key ideas.

Paraphrase to Clarify

This involves repeating what people say to make sure to clarify key ideas and to let others hear their points a second time (e.g. "Are you saying...? Do I understand you to mean...?")

Ask Questions

This is the most important tool you possess. Questions invite participation, gather information, test assumptions, and probe for hidden points.

Test assumptions

You need to bring the assumptions people are using out into the open and clarify them so that they are clearly understood by everyone. These assumptions may even need to be challenged

before a group can explore new ground. (e.g. "John, on what basis are you making the comment that Bob's idea is too narrow in focus?")

Summarize periodically

An effective facilitator listens attentively to all that is said and then offers concise and timed summaries. Summarize when you want to revive a discussion that has ground to a halt or to end a discussion when things seem to be wrapping up.

Effective Questioning

The following sample questions may inspire ideas for looking more deeply into an issue.

- What is keeping the problem from being solved?
- Why do you feel that way?
- What experiences have led you to that position?
- Is there data to support this?
- Who wants change to take place? Who does not?
- If the issue were totally resolved, what would the situation look like?
- What are the most significant barriers to resolving this issue?
- What are the limits of this effort? (time, money, materials)
- Are any solutions going to be unacceptable?
- Do you feel the group is overlooking some important considerations?

Do . . .

Ask clear, concise questions covering a single issue
Ask challenging questions that will stimulate thought
Ask reasonable questions based on what people know
Ask honest and relevant questions

Don't . . .

Ask rambling, ambiguous questions that cover multiple issues
Ask questions that don't provide an opportunity for thought
Ask questions that most people can't answer
Ask "trick" questions designed to fool people

Conflict Resolution & the Four Behaviors

*Conflict happens. It's natural. It's normal. It's necessary.
Effectively dealing with conflict is often one of the strongest indicators of your leadership.*

Behaviors

Identifying Assertive, Passive, Aggressive, & Passive-Aggressive Behaviors

Assertive Behavior

Being assertive is standing up for your rights without violating the rights of someone else, achieving the right balance between your needs and the needs of others. Assertiveness is the behavior required for successful outcomes when working in groups.

People behaving assertively value every person's needs, state what they want and do it in a way that takes into consideration the needs of others. People using assertive behavior believe that it is the responsibility of everyone to say what they need.

Assertive Behavior Cues

- Making direct eye contact
- Having a confident stance
- Asking others what they need
- Being concerned about everyone's feelings, including one's own
- Expecting everyone to be self-accountable

Key Assertive Skills

- Use declarative "I" statements to explain what you want or think.
- Describe the behavior you find to be unacceptable and give expectations for future behavior.
- Compromise by coming to agreement, satisfying everyone's basic needs.
- Limit your response when attacked.
- Hold the other person accountable for his or her behavior while stating how you want to be treated.

Passive Behavior

People using passive behavior communicate indirectly and do not say what they want. They expect others to figure out what they need and give it to them or withdraw when they don't get it.

People behaving passively are very concerned about how others view them and want to be liked. They behave in self-sacrificing ways, but later resent the person for whom they made the sacrifice.

Passive Behavior Cues

- Hoping others will give them what they want or need
- Hinting to others without stating directly what they want or need

- Pouting or withdrawing when they don't get what they want
- Being concerned about how others judge them and their actions
- Wanting to be liked by everyone
- Acting in self-sacrificing ways

Aggressive Behavior

People using aggressive behavior don't care about the needs or feelings of others or about how others perceive them.

This type of behavior continues because it often works. Others are hesitant to "take on" aggressive people because it is so unpleasant.

Aggressive Behavior Cues

- Using a loud, blustering voice
- Swearing or using abusive language
- Violating another's space
- Pounding on desks or staring
- Demanding what they need from others
- Being concerned only with their own feelings
- Enjoying being feared

Passive-Aggressive Behavior

People behaving passive-aggressively avoid direct response, but "get even" with others later for real or imagined slights. These individuals don't tell others when something bothers them, giving permission to the other person to continue the behavior that is offensive.

This behavior is interesting because it's a combination of two other styles. Passive behavior changes to passive-aggressive when people become "fed up." Aggressive behavior changes to passive-aggressive when people recognize that they can't act in their normal aggressive fashion (usually because of an authority situation).

Passive-Aggressive Behavior Cues

- Being sarcastic
- Sniping or indirect criticism
- Avoiding eye contact
- Never directly stating what they want or need
- Hinting
- Becoming "fed up" and blowing up

Scenario

Bob, Jen, Tim, Kim, and Lani are all on a bargaining team together. Lani is the chair. During caucus, discussion on whether to pay a stipend to highly effective teachers above the standard amount effective teachers receive gets heated. Bob begins to yell about only women being rated highly effective in his building. Kim is playing on her phone and just shrugs when Bob wants her to agree with him. Tim is trying to get Bob to calm down, tells him he understands, and doesn't

want Bob angry at him. Jen calmly asks Bob if he needs representation at his next evaluation meeting and if he believes he has been unfairly evaluated. She explains that she was rated effective by the same principal and understands it can be frustrating. Lani asks if all the principals scored similarly, would we, as a team, be okay with a stipend for highly effective? Or, is our biggest concern the lack of consistency in evaluation scores from different evaluators?

1. What behavior do you see from Bob?
2. What behavior do you see from Kim?
3. What behavior do you see from Tim?
4. What behavior do you see from Jen?
5. What behavior do you see from Lani?
6. How would you handle this meeting?
7. Have you noticed yourself exhibiting one or more of these behaviors?
8. Which were most successful and in what instances were they successful?

Conflict Resolution Strategies

1. **Recognize that all of us have biased fairness perceptions.** Both parties to a conflict typically think they're right and the other side is wrong. They quite literally can't get out of their own heads. Research by Carnegie Mellon University professors Linda Babcock and George Loewenstein shows their sense of what constitutes a fair conflict resolution is biased by *egocentrism* or difficulty seeing a situation from another's perspective. When in a conflict, we need to overcome our self-centered fairness perceptions. We might do this by jointly hiring a mediator who can help us see one another's point of view, or by enlisting another type of unbiased expert, such as an appraiser, to offer their view of the "facts."
2. **Avoid escalating tensions with threats and provocative moves.** When we feel we're being ignored or steamrolled, we often try to capture the other party's attention by making a threat, such as saying we'll take a dispute to court or try to ruin the other party's business reputation. There's a time and place for litigation, but threats and other attention-getting moves, such as take-it-or-leave-it offers, are often a mistake. Before making a threat, be sure you have exhausted all other options for managing conflict. People tend to respond to threats in kind, leading to an escalatory spiral and worsening conflict.
3. **Overcome an "Us vs. Them" mentality.** Group connections build loyalty and strong relationships, but they can also promote suspicion and hostility toward members of out-groups. As a result, groups in conflict tend to have an inaccurate understanding of each other's views and to see the other's positions as more extreme than they actually are. Whether as a group or on your own, you can overcome the tendency to demonize the other side by looking for an identity or goal you share. Begin your conflict management efforts by highlighting your common goal of reaching a fair and sustainable agreement. Try to identify and discuss points of similarity between you. The more points of connection you can identify, the more collaborative and productive your conflict resolution process is likely to be.
4. **Look beneath the surface to identify deeper issues.** Our deepest disputes often seem to involve money, for example: labor disputes over employee wages, and family conflicts over assets, etc. Because money is a finite resource, these conflicts tend to be single-issue battles in which one party's gain will inevitably be the other party's loss. But disputes over money often involve much deeper causes of conflict, such as the feeling that one is being disrespected or overlooked. The next time you find yourself arguing over the division of funds, suggest putting that conversation on hold. Then take time to explore each other's deeper concerns. Listen closely to one another's grievances and try to come up with creative ways to address them. This conflict management strategy is likely to strengthen the relationship and add new interests to the table, expanding the pie of value to be divided in the process.

5. **Separate sacred from pseudo-sacred issues.** Conflict management can be intractable when core values that negotiators believe are sacred, or nonnegotiable, are involved (eg. their family bonds, religious beliefs, political views, or personal moral code). Take the case of two siblings who disagree about whether to sell their deceased parents' farm, with one of them insisting the land must remain in the family and the other arguing that the parents would want them to sell it. We tend to err on the side of not negotiating when sacred principles and values are at stake, writes Program on Negotiation chair Robert Mnookin in his book *Bargaining with the Devil: When to Negotiate, When to Fight*. But many of the issues negotiators consider sacred are actually *pseudo-sacred*, notes Harvard Business School professor Max H. Bazerman—that is, the issues are only off-limits under certain conditions. So it's important to thoroughly analyze the benefits you might expect from negotiation that could allow you to honor your principles. For example, the sibling's objections to selling the family land might soften if a percentage of the proceeds are donated to the parents' favorite charity.

Borrowed from <https://www.pon.harvard.edu/daily/conflict-resolution/conflict-resolution-strategies/>

Triage for Local Leaders

Scenarios & Notepad

Directions: On chart paper, draw a chart similar to what you see on the note pad. Then place each of these scenarios in what your group thinks is the appropriate box. Write the scenario number in the box as well as the role of the person who should initially address the issue.

1. You discover the superintendent is paying a new hire the incorrect salary.
2. You realize that for the past several years, your Local has been acquiescing on committee positions and rather than appointing members to serve on committees at a rate equal to your membership percentage, teachers just sign up for committees. You know this isn't right and you have to do something about it.
3. A group of members has complained that there is no Local newsletter and they have petitioned the Local officers to start one.
4. Your UniServ Director, who suggests you do a whole bunch of things that seem like a lot of work, mentions that each Local should do a climate survey annually. Your Local has not done a climate survey for as long as you can remember but you do hear a lot of complaints from members about the middle school administrators.
5. Your UniServ Director, who suggests you do a whole bunch of things that seem like a lot of work, mentions that each Local should do a climate survey annually. Your Local has not done a climate survey for as long as you can remember but you deal with many climate issues each month at Discussion.
6. The legislative session just ended and your legislator did a crummy job, in your opinion. You feel like someone should call him/her to chat about how he/she should vote differently in the future.
7. Your Local isn't doing Discussion. At all. Like none.
8. It's September 1. Your membership is 48%. You know that most non-members have not gotten at one-on-one conversation with your building reps/association reps.
9. Your principal sends emails in the evenings and weekends. She says there is no expectation that these be read during the evenings and weekends but staff are feeling pressure to do so.
10. A member submits a letter of resignation in lieu of termination. A few hours before the next school board meeting, the member is told that the school board will not accept his resignation but will take action to cancel his contract instead.
11. Three members are not happy about the financial package that was bargained and want to meet about it. The bargaining timeline has expired, the contract has been ratified, and the next bargaining doesn't start for 10 months.

12. My colleagues and I are buried constantly by updating my records on the endless assessments we're supposed to give to our first graders - progress monitoring, oral and written assessments, sight words, etc. We're expected to have all my data up to date on Mondays after testing on Fridays. How do we get our weekends back and record it all?
13. Our special education teachers are feeling overwhelmed with teaching 8 groups a day, being the case manager for 27+ kids including several on behavior plans that need daily interventions, lesson planning, parent communication, and all that is expected in our school corporation.

Triage for Local Leaders



Emergencies/Fires That Need to Be Put Out

Important Issues to Deal with Soon

Issues that Need to Be Dealt With This Year

Issues that I'll Get to Some Day

Sample Election Nomination Form

Tefft Education Association Election Nominations

Please take a moment to nominate yourself or another member for the offices listed below. Two members may run together to share a single officer position. All offices are held for one year, with no term limits. Elected officers are responsible for attending monthly Leadership Team meetings. Place nomination forms in building rep's mailbox by April 3, 2021. If you are nominated, a building rep will verify your nomination acceptance. Once nominations are confirmed, elections will be held in each building on April 26, 2021.

President

Vice President of Membership Representation

Vice President of Membership

Vice President of Bargaining

Vice President of Discussion

Vice President of Scholarship Fund

Vice President of Sick Leave Bank

Vice President of Evaluation

Secretary

Treasurer

District Council Delegate (1st nomination)

District Council Delegate (2nd nomination)

**Delegate to the ISTA Representative Assembly
(1st nomination)**

**Delegate to the ISTA Representative Assembly
(2nd nomination)**

For Building Representatives and Committee Members, nominate only for the school in which you are placed and for up to the number allowed per building: Dunn's Bridge - 2, Kniman - 2, Kersey - 2, Tefft MS - 2, Tefft High School - 3.

Building Representative

Membership Committee

Bargaining Committee

Scholarship Committee

Sick Leave Bank Committee

Evaluation Committee

Discussion Committee

Tefft Education Association Officers and Responsibilities

President: shall preside at all meetings of the TLCTO and the Leadership Team and shall be an ex-officio member of all committees.

Vice President of Member Representation: shall assume all duties of the president in case of absence, resignation, or death, coordinate training for building representatives on representing members when necessary, assist building representatives when representing members when necessary, and coordinate with the President on member representation issues when necessary.

Vice President of Membership: shall be in charge of all on-going membership campaigns, maintain a current list of members and non-members, maintain a current email list of members, and report current membership numbers at each meeting of the Leadership Team.

Vice President of Bargaining: shall coordinate training for bargaining team members when necessary, maintain communication with the superintendent about bargaining, call and coordinate meetings of the bargaining team, ensure communication between the bargaining team and members, and organize the ratification meeting.

Vice President of Discussion: shall coordinate training for discussion team members when necessary, maintain communication with the superintendent about discussion, call and coordinate meetings of the discussion team, and ensure communication between the discussion team and members.

Vice President of Scholarship Fund: shall collect applications for the TLCTO scholarship, organize scholarship committee meetings to determine scholarship winners, organize someone to present the scholarship at Awards Night, and ensure scholarship funds are distributed to recipients.

Vice President of Sick Leave Bank: shall collect requests to the sick leave bank, organize meetings of the sick leave bank committee, and communicate the decisions of the sick leave bank committee to appropriate parties.

Vice President of Evaluation: shall solicit feedback on the evaluation model, coordinate meetings of the evaluation committee, and communicate decision of the committee to the Leadership Team and members.

Secretary: shall keep minutes of all meetings of the TLCTO and the Leadership Team, shall notify the President if any elected member of the Leadership Team resigns or forfeits their membership on the Leadership Team, shall notify members in advance of all TLCTO and Leadership Team meetings, shall send emails to members on behalf of other officers when requested, shall provide to members a short summary of Leadership Team meetings, and shall maintain the hard copy and digital files of the TLCTO.

Treasurer: shall have charge of all funds of the TLCTO, shall maintain them in a bank in the name of the organization with the President as a co-signer on the account, and shall disburse funds as authorized by a vote the Leadership Team, and shall develop a budget for approval by the Leadership Team and provide account balances at each meeting of the Leadership Team.

District Council Delegates: shall represent TLCTO at District Council meetings and report back from those meetings to the members.

Delegates to the ISTA Representative Assembly: shall attend the one-day ISTA Representative Assembly, vote on matters before the assembly on behalf of members, and report back information from the Representative Assembly to the members.

Building Representatives: shall be responsible for representing members in meetings with their principals and shall assist with membership.

Committee Members: shall be responsible for scheduling and attending meetings and relaying information back to the Leadership Team.

Sample Election Ballot

Tefft Education Association Election Ballot

Please circle the member(s) for whom you wish to vote for the following positions. Vote once per position except where noted. When two names are separated by an ampersand (&) that indicates those two members are running together to share a single position, which is allowable according to our constitution and bylaws.

President

Frank Underwood • Clair Underwood & Doug Stamper • Zoe Barnes • Write In:

Vice President of Membership Representation

Blanche Devereaux • Rose Nylund • Sophia Petrillo & Dorothy Zbornak • Write In:

Vice President of Membership

Willis Jackson & Kimberly Drummond • Arnold Jackson • Phillip Drummond • Write In:

Vice President of Bargaining

Daisy Duke & Luke Duke • Bo Duke • Roscoe P. Coltrane • Boss Hog • Write In:

Vice President of Discussion

Jo Polniaczek • Tootie Ramsey • Edna Garrett • Write In:

Vice President of Scholarship Fund

JJ Evans • Florida Evans • Wilona Woods & Thelma Evans • Write In:

Vice President of Sick Leave Bank

Freddie “Boom Boom” Washington • Arnold Horshack • Juan Epstein • Write In:

Vice President of Evaluation

Raj Thomas & Freddy “Rerun” Stubbs • Dwayne Nelson • Dee Thomas • Write In:

Secretary

Roseanne Roseannadanna • Mary Katherine Gallagher • Stuart Smalley • Write In:

Treasurer

George Costanza • Jerry Seinfeld and Elaine Benes • Cosmo Kramer & Frank Costanza • Write In:

District Council Delegate (Choose Two)

Piper Chapman • Suzanne “Crazy Eyes” Warren • Tasha “Taystee” Jefferson • Write In:

Delegate to the ISTA Representative Assembly (Choose Two)

Louise “Weezy” Jefferson • George Jefferson • Florence Johnston • Write In:

OVER OVER OVER OVER OVER OVER OVER OVER OVER OVER OVER OVER

*This part of the ballot is unique for each building. Please select **two** choices for each of the following except the high school should choose **three** for each position.*

Tefft MS

Building Representative

Woody Boyd • Carla Tortelli • Norm Peterson • Cliff Clavin • Diane Chambers • Write In:

Membership Committee

Venus Flytrap • Les Nessman • Herb Tarlek • Bailey Quarters • Dr. Johnny Fever • Write In:

Bargaining Committee

Laura Ingalls • Nellie Oleson • Pa Ingalls • Almanzo Wilder • Mary Ingalls • Write In:

Scholarship Committee

Mr. Hooper • Olivia Robinson • Gordon Robinson • Maria Rodriguez • Luis Rodriguez • Write In:

Sick Leave Bank Committee

Laverne DeFazio • Shirley Feeney • Andrew “Squiggy” Squiggman • Lenny Kosnowski • Write In:

Evaluation Committee

Granny Clampett • Elly May Clampett • Jed Clampett • Jethro Bodine • Jane Hathaway • Write In:

Discussion Committee

Hot Lips Houlihan • Col. Potter • Max Klinger • Hawkeye Pierce • Radar O’Reilly • Write In:

Powerhouse Locals

An Incentive for Locals to Excel

Powerhouse Local Rubric

- ☐ Meet the Quality Local Award qualifications • 12 pts
 - Share completed submission form with documentation or provide said information to me without submission to ISTA.
 - Qualifications are listed on the back of this paper.
- ☐ At least 6 executive committee meetings • 6 pts
 - Provide agendas and minutes for each meeting
- ☐ At least 2 general membership meetings • 4 pts
 - Provide agendas and minutes for each meeting
- ☐ At least 2 social activities for your local • 4 pts
 - Provide a short summary of when, how many attended, and how the event was received
- ☐ At least 8 corporation wide discussion meetings • 8 pts
 - Provide agendas and minutes for each meeting
- ☐ 1 training with UniServ Director from the Pick a Training list • 10 pts
 - See list.
- ☐ Attendance at Northern Advocate Conference • 4 pts/ attendee
 - List attendees
- ☐ One on one's with membership and/or nonmembers
 - 1:1's with at least 75% of members 20 pts
 - 1:1's with 50% of members and 50% of nonmembers 30 pts
 - 1:1's with 50% of members and 80% of nonmembers 40 pts
 - 1:1's with 90% of members and 90% of nonmembers 50 pts
 - Provide list of members and/or nonmembers, as applicable, who you had 1:1's and the leader who spoke to each person.

Total Points Earned

12-20 points	=	Doughnuts for each building and a \$25 gift card for your local
21-30 points	=	Doughnuts for each building and a \$50 gift card for your local
30-40 points	=	Doughnuts for each building and a \$75 gift card for your local
41 + points	=	Doughnuts for each building and a \$100 gift card for your local

Clarifications on the process for applying for Powerhouse Local

You must do all the activities within a given line, unless indicated separately. You can do more than what is on each line. For example, you must have 6 executive committee meetings and submit the agenda and minutes. If you do 5, you would not qualify for that line. If you do 7, that's awesome, but it is still only worth 6 points for this award. 1:1's must be done by a local member to count.

Any questions on what qualifies can be emailed to your UniServ Director.

Quality Local Award Qualifications Summary

https://forms.ista-in.org/machform/view.php?id=44315&mf_page=2

Requires all five

1. Increase membership percentage over the previous year or have 75% or more membership.
2. Seat at least 50% of your delegates at ISTA RA.
3. Meet ISTA Bylaws for dues payment.
4. Communicate regularly with all of your members.
5. Meet state association affiliation standards, i.e updated local Constitution and Bylaws.

Requires meeting any seven (7) of the following

1. Send at least one representative to NEA RA as state, local, or cluster delegate.
2. Send at least two (2) representatives to ISTA regional or district bargaining training/workshops.
3. Attend at least one ISTA lobbying day or local third house meeting.
4. Have at least one (1) elected district council delegate from the local participating at each District Council meeting.
5. Provide a program that welcomes and informs its new teachers or Education Support Professionals.
6. Hold discussion meetings with the local administration representatives.
7. Send at least one (1) elected officers to the ISTA Summer Conference/other designated event
8. Conduct Association activities to promote community support for public education.
9. Participate in association representative (AR) training.
10. Participate in local treasurer training
11. Obtain at least 75% of all new hires as members.

Pick a Training

I would like the opportunity to train your officers, association representatives, committee(s), new members, or general membership on one of the following topics this school year.

Please choose one of the following trainings.

Select a month that would work best for you and we will coordinate dates from there.

Each training lasts 45 minutes-1 hour.

You can choose more than one but are asked to choose at least one.

1. Discussion-basics
2. Discussion-advanced
3. Building level discussion and committees
4. Organizing for a stronger local
5. Making the most of meetings
6. Legal rights of members
7. How to represent a member in trouble
8. Where's the Line? Appropriate student-teacher boundaries
9. Conflict resolution
10. Grievance processing
11. Roles and responsibilities of a well-functioning executive committee
12. Association Representative (AR) training
13. Other (please describe what you want to learn/accomplish)

Selection: _____ Month: _____ Audience: _____

Selection: _____ Month: _____ Audience: _____

Selection: _____ Month: _____ Audience: _____

Your Leadership Style

An Assessment & Explanation

What's My Leadership Style? Response and Scoring Form

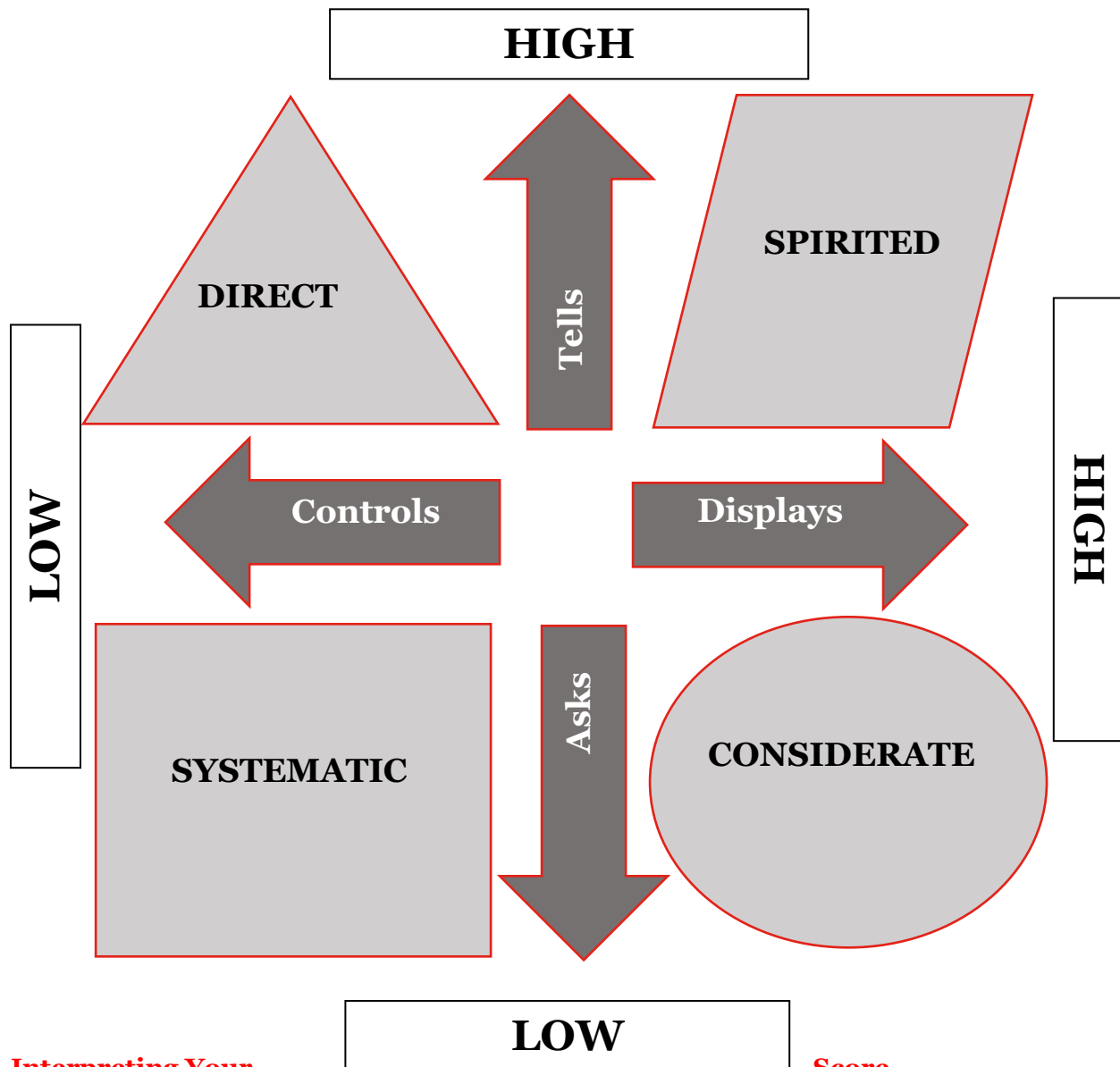
Directions: For each pair of leadership actions below, assign a total of 5 per line points by dividing the points between both actions. Use any combination adding to 5 points (0 and 5, 1 and 4, or 2 and 3). Do not use fractions.

When getting others to work towards a goal, and I am under stress, I am likely to...

		Equal to 5			
1.	Generate excitement.			Act decisively.	1.
2.	Take charge.			Offer guidance.	2.
3.	Provide encouragement.			Provide structure.	3.
4.	Point out omissions.			Seek everyone's input.	4.
5.	Emphasize goals.			Outline a sequence of steps.	5.
6.	Promote positive thinking.			Push to beat the competition.	6.
7.	Maintain a comfortable work space.			Get down to business.	7.
8.	Define tasks.			Require speed.	8.
9.	Direct others.			Create a free environment.	9.
10.	Listen to suggestions.			Provide challenges.	10.
11.	Plan things carefully.			Focus on the deadline.	11.
12.	Create a sense of urgency.			Spark creative thinking.	12.
13.	Offer inspiration.			Promote cooperation.	13.
14.	Monitor progress closely.			Improvise along the way.	14.
15.	Adopt a familiar approach.			Brainstorm new approaches.	15.
16.	Make it fun.			Set high standards.	16.
17.	Rally team spirit.			Show appreciation.	17.
18.	Demonstrate enthusiasm.			Analyze the situation first.	18.
19.	Request accuracy.			Foster teamwork.	19.
20.	Promote logical thinking.			Help out.	20.
Totals for Each Style					
Spirited 		Direct 		Considerate 	
				Systematic 	

What's My Leadership Style? Response and Scoring Form Part 2

Directions: Copy the totals for each style from the previous page into the chart below. This is your leadership style profile.



Interpreting Your

Score

Each of the four styles can be described based on a degree of assertiveness or expressiveness.

Direct	High assertiveness, low expressiveness, leads by taking charge
Spirited	High assertiveness, high expressiveness, leads by inspiring
Considerate	Low assertiveness, high expressiveness, leads by building group harmony
Systematic	Low assertiveness, low expressiveness, leads by planning carefully

People generally develop a leadership style they are most comfortable using. That is their dominant style. Take a look at your Leadership Style Profile. Did you score higher than 16 on any style? If so, you probably prefer to use this style whenever you can. Did you score below 10 on any styles? These are probably leadership styles that you do not use often. Some people have one clearly dominant style. Those people generally use that style to the exclusion of others.

Others may use a variety of styles. They would have a relatively even distribution of points in their Leadership Style Profiles.

Is There a Best Leadership Style?

In a word, no. Current theory suggests that different situations require different leadership styles. In fact, the most important take-away from this assessment is this: *The most effective leaders are the ones who adapt their styles to the requirements of the situation.*

Too Much of a Good Thing?

You probably find yourself most comfortable leading others in those situations in which your dominant style is most effective. But sometimes you may need to move outside of your comfort zone so that you can adapt your style to the demands of a situation. Each style has definite strengths. However, some strengths, when taken to an extreme, can become weaknesses.

Direct

Direct leaders, when stressed, may cross the line from taking charge to being overbearing.

Direct leaders, like to get things done quickly, which is usually a plus. However, if some of their followers work at a slower pace, they may feel pressured by their direct leader's drive. In addition, direct leader's sensed of urgency may cause them to be reluctant to delegate.

Direct leaders like to compete, which may give their organizations an edge over others. However, taken to extremes, their competitive spirit may intimidate those they lead.

Direct leaders work hard. But when they expect the same high-octane performance from those they lead, they may cause their followers to burn out.

Systematic

Systematic leaders provide structure for activities, which usually helps tasks or projects progress without a hitch. However, when systematic leaders impose too much structure, their followers may chafe under so much control.

Systematic leaders make sure that no one overlooks the important details. But taken to the extreme, their conscientiousness may make the people they lead feel bogged down.

Systematic leaders make sure that all the data is in before making decisions, which is usually a sound policy. However, when urgent situations call for quick action, systematic leaders' thoroughness may be counterproductive.

Systematic leaders insist on objectivity and accuracy above all else. As a result, those they lead may view them as impersonal or picky.

Spirited

Spirited leaders are good at generating enthusiasm among their followers. Yet taken to an extreme, their persuasive abilities may become manipulative.

Spirited leaders know how to prompt those they lead to develop fresh new approaches. However, their emphasis on thinking of new ways to do things sometimes comes at the expense of making sure that things are carried through to completion.

Spirited leaders inspire their followers by providing them with a vision. But in presenting the big picture, they may sometimes gloss over the important details.

Spirited leaders enjoy motivating their followers from center stage, but sometimes they forget that they also need to provide their followers with an audience, by listening to them.

Considerate

Considerate leaders provide their followers with a sense of reassurance when times are difficult or rapidly changing. However, their desire to keep things comfortable by keeping them the same may cause them to resist change, rather than helping their followers adapt to it.

Considerate leaders build a loyal following by demonstrating their support for others. However, some of their followers may view their support as permissiveness.

Considerate leaders recognize the importance of taking their followers' views into account. But taken to an extreme, their willingness to accommodate others' views may cause them to cave in or appear to cave in.

Considerate leaders are good at maintaining team harmony, but, in some cases, their desire to maintain harmony may cause them to avoid constructive conflict.

Action Planning

Now that you have identified your own leadership style, how can you put it to work? Use the following questions to guide your planning.

1. Based on the information you obtained from this assessment, what do you view as your personal strengths as a leader?
2. What are your areas for improvement as a leader?
3. Think of a specific situation in which you will need to influence others to accomplish a goal. What strengths can you use to your advantage? How do you plan to adapt your leadership style to meet the requirements of the situations?

Identifying a Winning Issue

A winning issue is widely felt, deeply felt, and winnable.

<i>Issue 1</i>	<i>Issue 2</i>	<i>Issue 3</i>	Will the Issue:
			1. Result in a real improvement in the lives of students, school staff, and community members
			2. Give people a sense of their own strength
			3. Alter the relationships of power
			4. Be worthwhile
			5. Be winnable
			6. Be widely and deeply felt
			7. Be easy to understand
			8. Identify the decision-maker
			9. Have a timeline that works for your group
			10. Not be divisive
			11. Build leadership
			12. Be consistent with the group's values and vision in support of public education and public education employees

Power Analysis

“Pay attention to the puppeteer, not the puppet.” -Dave Rathke

Steps

1. Define the major issue or problem.
2. Identify our solution/goal.
3. Identify the key decision makers (primary and secondary). What do we know about them? What do they care about?
4. Identify our allies or potential allies. What do we know about them? What do they care about?
5. Identify our opposition. What do we know about them? What do they care about?
6. Map the decision makers (primary and secondary), allies and opposition on the power grid based on their position/support of our issue and their degree of influence on our issue/goal.
7. Use the map to develop a strategy to achieve our goal. Analyze what the decision makers care about and what will move the decision makers to support our goal. Who should we engage that will positively influence the decision maker on our goal (allies)? Who do we need to neutralize that may negatively influence the decision maker on our goal (opponents)?

Our Campaign Goal/Objective

10 Decisive decision-making power

8 Has influence on decision-making

6 Taken into account

4 Can get attention

3 Ignored

1 Actively disregarded

Die Hard Support

Support

Inclined Towards

Neutral

Inclined Against

Oppose

Die Hard Oppose

Last updated 6/26/2019